Black, Indigenous, and Faculty of Color Awareness of Open Access

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This qualitative study examines perceptions of open access from focus groups including thirty-eight faculty who identify as Black, Indigenous, and People of Color (BIPOC). In responses, BIPOC faculty reflect on the culture and support of open access within their departments, institutions, and professional associations. It was at a time of increased discussion about knowledge equity, the impact of access to research during the 2020 pandemic, and a precursor to the 2022 U.S. Office of Science and Technology Policy Memo to expand access to data and publications sponsored by all federal funding agencies. In general, BIPOC faculty face compounded risks with open access and inequities in scholarly publishing. However, participants believe open publishing processes allow more flexibility and connection to communities. The investigators use the grounded theory method for analysis, provide themes as well as direct quotes from the data, and discuss practical applications for supporting BIPOC scholars with engagement in open access.

Introduction

This research explores the risks and rewards of participation in open access (OA) publishing for tenure and promotion by Black, Indigenous, and faculty of color. It explores their perceptions of the culture (or lack thereof) of OA at their institutions and within their disciplines. Despite the Western open movement being several decades old (it is important to note that South and Central America have a longer history with open access), there is still a gap in research on the perceptions of faculty who identify as Black, Indigenous, and People of Color (BIPOC) regarding open access (Cox 2023; European Commission 2023). The initial data collection for this study was sponsored by a grant from the Association of College and Research Libraries (ACRL) to advance their research agenda for scholarly communication, which identified needed areas of research to foster a more open, inclusive, and equitable scholarly communications system (ACRL, 2019). Additional sponsorship was provided by Lumina Foundation.

Open access is defined as the free, immediate, online availability of research articles combined with the rights to use these articles fully in the digital environment, according to the Scholarly Publishing and Academic Resources Coalition (SPARC). In addition to historical moments referring to "gold" and "green" OA routes, additional models emerged, such as hy-

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brid (a mixture of open access and closed access articles) and diamond (journals that publish open access without charging authors article processing charges) (Budapest 2002, 2012, 2022; Bethesda 2003, Berlin 2003, UNESCO 1999).

This study primarily examines BIPOC faculty experiences, perceptions and engagement with publishing research as open access. It does not focus on faculty perceptions of open data, broader open science practices, or open educational resources. We theorized (through lived experience and anecdata) that faculty may engage with different sectors of open access i.e., findable, accessible, interoperable, and reusable (FAIR) data principles and open educational resources (OER) (Wilkinson et al. 2016; Wiley, Bliss & McEwan 2013). However, we discovered that faculty were unlikely to be aware of the full breadth of terms and nuances (e.g., "green" or "diamond" open access pathways) compared to open access advocates based on awareness levels reported in previous studies. We speculated that BIPOC faculty may lack awareness generally, possibly due to exclusion at their institutions, both explicit and implicit.

We sought a pool of faculty who identify as Black, Indigenous, and/or People of Color, a population that is historically underrepresented in academia. The majority of the thirty-eight respondents we interviewed were employed by unique two and four-year colleges and universities in the United States and South Africa (the vast majority of participants worked in the U.S.) It is important to note that the study was conducted at a time of increased discussion about knowledge equity and the impact of access to research during the 2020 pandemic; also, it was a precursor to the 2022 U.S. Office of Science and Technology Policy Memo to expand access to data and publications sponsored by all federal funding agencies (whitehouse.gov 2022). By providing direct responses from BIPOC faculty, our study addresses the "Improving the Working Lives of People Engaged in Scholarly Communications" (particularly creating incentives for participation) agenda item included in the 2019 ACRL *Open and Equitable Scholarly Communications Report*. Additionally, faculty librarians were included in our sample. Including faculty librarians' unique perspectives as authors of research publications and as part of the library workforce addresses the "Creating a Broader Scholarly Communications Workforce" agenda item listed in the ACRL Report.

Our primary research questions were:

1. What are the attitudes BIPOC faculty hold towards open access publishing?
2. What are the perceived benefits and detriments for BIPOC faculty who publish in OA journals?

Literature Review

Previous studies largely focus on faculty populations by discipline, institution, or geographical region. Although this study features responses from faculty within the United States, studies from outside the U.S. were included to provide experiences of BIPOC faculty and consider how these factors impact the present context of scholarly communication and open access publishing. While the literature of generalized perceptions of faculty includes studies from multiple geographical regions, no studies appear to gather perceptions of faculty with regard to racial, cultural, or ethnic diversity, equity, and inclusion. According to the National Center for Education Statistics (NCES), the demographics of the participants in Richardson, McLeod, and Hurst's study (2019) on faculty perceptions of open access collected responses from faculty members in postsecondary institutions, 70 percent identified as white and approximately 40 percent identified as male. Ten percent were Black, 9.2 percent were Hispanic, 0.7 percent were Asian, and 0.7

percent were Native American or Alaskan Native; none of the respondents were Native Hawaiian or Pacific Islander. As of Fall 2021, 66 percent of faculty at non-profit, four-year institutions were white and 34 percent were BIPOC or unknown (NCES 2022). Additionally, BIPOC faculty find more difficulty earning promotion and tenure as well as equal pay compared to their white counterparts, which is attributed to variations in field, experience, and research productivity (Li and Koedel 2017). There are also no previous known studies that examine how intersectional identities (e.g., gender, sexual orientation, location, etc., in conjunction with racial identity) may impact faculty experiences with and perceptions of open access (Cho, Crenshaw & McCall 2013). Gendered examinations of awareness or use were occasionally reported showing that female faculty published less per year but valued publications more and were more likely to use OA resources than male faculty (Kaba and Said 2015; Li and Koedel 2017; Niles et al. 2020).

Many participants in our study worked with diverse, international research communities and colleagues. In recent years, discussion of inequity within and historical and political contextualization of the open access landscape has increased. Advocates for inclusion and equity in open access highlight privacy, visibility, and risk as concerns for marginalized scholars and communities when access to information is openly shared (Chan et al. 2019). Chan et al. emphasize that perceptions, benefits, opportunities and challenges regarding open access look different by region and cultural norms, not just by discipline (2019). Therefore, the context of what, where, and how research or knowledge is produced, and by or for whom, greatly determines whether its impact causes benefit or even harm. Previously, general studies noted altruism and democratization of knowledge as motivations for publishing open access, including researcher values and contexts for sharing knowledge. For example, faculty specifically favored reuse for non-commercial purposes rather than commercial purposes, such as translation and text and data mining (Joung, Rowley, and Sbaffi 2019). However, in recent years advocates and scholars have investigated the nuances of whether making research freely available online is inherently more equitable than traditional dissemination of research. For example, cultural knowledge legitimacy, creation, and sharing, particularly from marginalized cultures, demonstrate values and practices often at odds with those of Western institutions (Albornoz, Okune, and Chan 2020; Dominik et al. 2022). Due to this misalignment or subjugation, some advocates assert that there are opportunities to enact social justice within scholarly communication and open access (Roh, Inefuku, and Drabinski 2020; Dominik et al. 2022).

Open access perception studies mainly used surveys and reported a mix of quantitative and qualitative data (Khoo 2019; Richardson, McLeod, and Hurst 2019; Dalton, Tenopir, and Björk 2020; Niles, Schimanskiet al. 2020;Tmava 2023; Gaines 2015). Over time, faculty awareness, use, and regard for open access increased and evolved. It is important to note that some regions where these studies were conducted, such as Australia and South America, developed nation-wide open access policies and infrastructure that provide a different context than in North America, for example, which has open access policies at individual universities and federal and private funding agencies (Alperin 2015; Dalton, Tenopir, and Björk 2020; Cox 2023; European Commission 2023). A ROARMAP (Registry of Open Access Repository Mandates and Policies) report identified 157 separate policies in North America (130 in the United States and 27 in Canada). By comparison, there are 463 across Europe (Dalton, Tenopir, and Björk 2020). Dalton, Tenopir, and Björk also examine the impacts of funder policies such as Plan S, an initiative whereby research funders mandate that access to research publications that are

generated through research grants that they allocate must be fully and immediately open and cannot be monetized in any way (https://www.coalition-s.org/).

General faculty awareness has increased over time, but their attitudes and practices regarding open access publishing did not change significantly. In early studies, faculty researchers on the whole indicated limited knowledge about open access practices and outlets, but great support for the philosophy, tenets, and ethos of the OA movement (Nicholas et al. 2005; Gross and Ryan 2015). Dalton, Tenopir, and Björk analyzed perceptions of pro-OA faculty and non-OA faculty, finding that there was no statistically significant difference between both groups' familiarity with open access; only their attitudes about open access varied (2020). However, even when faculty support the principle of open access, there are only a minority who make their own publications open. Gaines notes that faculty were familiar with the general concept of open access and felt confident they could explain it to a colleague, but only a small percentage were familiar with nuances such as the difference between "gold" and "green" open access pathways (2015). Although OA gained recognition across disciplines by 2015 (and in fact constituted an estimated 25 to 33 percent of active journals worldwide), traditional, pay-to-read, subscription-based models still accounted for the other 67 to 75 percent of academic publishing (Gross and Ryan 2015). Seventy-six percent of faculty in Gross and Ryan's study had not previously published in an OA journal, while mid and late career researchers were more likely to have published open access. Moreover, only 18 percent budgeted for OA article processing fees, and 71 percent did not actively search for material in repositories, indicating that open access did not significantly factor into their research practices.

Support, pathways, and culture for open access publishing, of course, vary among disciplines and research outputs. The rate of adoption of OA models in the humanities and social sciences has historically been lower than in STEM disciplines. This has been attributed, in part, to the nature of STEM disciplines to publish a high volume of articles, which is tied to rising costs of serial subscriptions, requirements for sponsored research, and pressure to "publish or perish" (Gross and Ryan 2015; Niles et al. 2020; McKirnan et al. 2019). Despite the prioritization of the book in the humanities, there are many open access journals available in those fields (Gross and Ryan 2015). Studies report that social science, arts, and humanities (SSAH) faculty were more likely to be aware of open access and believe it would be beneficial to their field, but few had actually published open access (Gaines 2015; Dalton, Tenopir, and Björk 2020). SSAH authors doubt the potential for OA to expand their own readership, particularly for non-academic audiences (Dalton, Tenopir, and Björk 2020). Gross and Ryan highlight open monographs as a catalyst for change within the SSAH fields, citing Knowledge Unlatched as an early sustainability initiative (Gross and Ryan 2015). Open Library of the Humanities (OLH) is another early sustainability initiative that includes grant funding, organizational memberships, and operational cost transparency (https://openlibhums.org/site/about/the-olh-model/). The OLH model made headlines for acquisition of the linguistics journal *Glossa* when editors transitioned from a commercial publisher (Elsevier) to become open access (https://glossa-journal.org/). In educational leadership, for example, there are not the same robust publishing venues, funding sources, and culture of open access practices as in STEM. The discrepancy between available funding sources for STEM and SSAH fields is likely a driving factor for lower adoption in social science and humanities despite increased awareness and similar attitudes toward open access. The ease of publishing open access for a

wide range of outputs and in multiple disciplines may be important to note, as SSAH fields are more diverse, but BIPOC faculty are underrepresented in STEM fields (Li and Koedel 2017).

Top benefits listed by researchers were higher research impact, greater dissemination, and greater public access to research within specialist academic areas (Gross and Ryan 2015; Joung, Rowley, and Sbaffi 2019). Studies also mentioned the perception of faster turnaround time with open access publishing, allowing faculty researchers and scholars to publish more quickly (Richardson, McLeod, and Hurst 2019; Joung, Rowley, and Sbaffi 2019). As a result of broader readership and public access, several studies highlight the advantage of higher citation rates as a benefit of open access. Between 20 and 25 percent of respondents in Richardson, McLeod, and Hurst's study believed that open access journals drive innovation and have higher readership. Over half of the respondents disagreed that open access journals were cited more often than traditional journals. However, other studies report more ambivalence from faculty perceptions about OA citation advantage (Joung, Rowley, and Sbaffi 2019).

Several studies observe perceived barriers, critiques, concerns, and limitations of open access. The major barriers included lack of broad awareness of OA, a belief that OA journals do not provide high enough impact, the limitations of article processing charges (APCs), and unfamiliarity with existing OA processes and models. APCs were identified in most studies as a primary concern, particularly because APCs continue to inflate over time (Gaines 2015; Khoo 2019; Richardson, McLeod, and Hurst 2019; Halevi and Walsh 2021;Tmava 2023). The most prominent concern about open access is the affordability of APCs and distribution of funds from well-resourced institutions in the West to Western prestige journals (Roh, Inefuku, and Drabinski 2020; Halevi and Walsh 2021; Cox 2023). Richardson, McLeod, and Hurst assert that as the field of educational leadership continues to strengthen its social justice orientation, it is imperative to openly confront the reality that passwords and paywalls limit access and inevitably privilege more affluent institutions and scholars who can afford subscription-based journals (2019). Multiple replicated studies found that just 30 percent of APC-funded journals are open access, but 56 percent of those journals publish open access articles (Khoo 2019).

Self-archiving, or green open access, is a pathway that circumvents cost but may be out of reach for many faculty. Faculty were not aware of self-archiving, could not differentiate between a repository and subscribed databases, and reported concerns about plagiarism, misunderstanding copyright considerations, submission process, lack of time, or not perceiving benefits of submitting work to an open access repository (Kim 2011; Tmava 2023). Gaines (2015) also noted faculty discomfort with Creative Commons licenses in particular, finding that the majority of faculty were unfamiliar with them. Historically, copyright and concepts of ownership excluded marginalized groups, and modern copyright continues to perpetuate this exclusion (Hathcock 2017). Navigating author's rights may be a compounded barrier or concern for those from marginalized groups. Motivations in favor of using the repository included access and readership as well as altruism.

The choices that faculty members make regarding where to publish can impact retention, promotion, and tenure considerations within their departments and colleges as well their potential impact within their larger professional communities (Richardson, McLeod, & Hurst 2019; Niles et al. 2020). Some studies found open access was considered a barrier to or a low priority for promotion and tenure, while others found no difference in how open access publications were evaluated compared to subscription journals. Since the 1980s, tenure requirements have shifted to emphasize research publications while placing less importance

on teaching and service (Richardson, McLeod, and Hurst 2019). There is also a paradoxical perception that early career faculty are better suited to engage with newer models like open access but are considered vulnerable to risking tenure if they engage in unconventional practices. Conversely, mid and late career faculty are considered better suited perceived risk taking in their career post-tenure, but they are not interested in engaging with new publishing practices (Gaines 2015). Newer cohorts of faculty are reported to be more racially and ethnically diverse, but there is not a trend of more black faculty in STEM fields (Li and Koedel 2017). Additionally, journal impact factor and citations were considered more important than alternative metrics in promotion and tenure evaluations (Joung, Rowley, and Sbaffi 2019; McKiernan et al. 2019). Faculty also believed their peers valued prestige, journal impact factor, and citations more while believing they personally valued readership and open access more than peers (Niles et al. 2020).

Researchers' findings about perceived journal quality of open access versus subscription journals were split. Slightly more than a third of participating faculty in Richardson, McLeod and Hurst's study believed that articles in open access journals undergo the same review process as articles in traditional journals. However, respondents' answers to additional questions show that approximately 80 percent of them did agree that open access journals had the potential to be high quality and rigorous, even if that was not always true in practice (Richardson, McLeod, and Hurst 2019). In addition to more positive perceptions of quality than in previous studies, some studies reported more ambivalence (Joung, Rowley, and Sbaffi 2019). Also, researchers favored "a rigorous assessment of the merit and novelty of [their] articles with constructive comments for its improvement, even if this takes a long time," contradicting praise for open access's accelerated process (Joung, Rowley, and Sbaffi 2019). Slightly more than a third of participating faculty believed that articles in open access journals undergo the same review process as articles in traditional journals (Richardson, McLeod, & Hurst 2019). Two-thirds of respondents also reported that open access publishing might allow them to more easily share their work. When asked about submitting future articles, over a third (35.9 percent) of faculty members at University Council for Educational Administration (UCEA) institutions reported that it was unlikely that they would submit their work to an open access journal; this is over four times the number (8.5 percent) who reported that they were unlikely to submit to a traditional subscription-based journal.

Methods

We used Constructivist Grounded Theory (CGT), which supports the open-ended collection and analysis of data. Unlike Grounded Theory, we co-constructed theory by taking multiple perspectives and the positioning of researchers and participants into account. We are members of the same BIPOC community, in that we are Black women who have held tenure track faculty librarian positions in the academy. We did not recruit from our employing institutions; however, ten librarians/archivists with faculty status from other institutions were included in the pool. Our positioning as BIPOC faculty librarians who specialize in scholarly communication, digital humanities, and cultural studies, respectively, shaped some of our research questions, but they were largely based on previous studies and observations from the field. For example, we asked about perceptions of regional and language biases in publishing because this is a known issue for equitable access. Throughout our careers we have published in OA and traditional journals, have been appointed as fellows of multiple Open advocacy

organizations, and have promoted open access publishing and the Open movement broadly in academia and beyond.

We applied a CGT based on reoccurring themes from the data. CGT does not assume theories are discovered and uses existing theories where they apply (Strauss and Corbin, 1997; Charmaz, 2006). Within CGT, we used a constant comparison to direct our iterative analysis. Constant comparison is a method of Grounded Theory in which data is compared against existing findings throughout the data analysis period. We sought a larger-than-required participant pool for this exploratory qualitative study to aim for theoretical saturation (a CGT goal of learning all you can about a particular topic) in addition to having the time and funding to do so. The focus groups were semi-structured with a controlled set of questions and follow-up questions as participants elaborated on their experiences and knowledge of open access.

This study was approved by the Institutional Review Boards at the University of California Irvine and Florida State University. Our team conducted eight focus group interviews with a select pool of thirty-eight faculty from thirty-eight institutions (postdocs, librarians, contingent, tenure track, and tenured faculty) who identify and are perceived as Black, Indigenous, and People of Color, a population which is historically underrepresented in academia and faculty specifically. We sought a target sample size of thirty-six to forty participants to surface relevant themes with a heterogenous group, according to best practices for qualitative research. We also sought a larger sample size to convene a wide range of disciplines, geographic locations, and backgrounds in each focus group. For inclusion in the study, we required that participants speak English. No focus group was smaller than three participants nor larger than eight, the intention being to hold manageable discussions.

We conducted a pilot focus group at a conference to attempt to reduce our bias as researchers, refine our interview questions, and inform recruitment as well as our data collection practices. We found, for example, that pilot participants often conflated or did not distinguish between open access to research and open education resources, so we included a list of definitions in the following focus groups (we did not include data from the pilot in our analysis.) The objective was to conduct an exploratory study that identified larger themes from the data, not to be prescriptive. The results of the study are not generalizable but provide pertinent information for advocates interested in making the scholarly communication landscape more open, diverse, equitable, and inclusive.

Participants were recruited through a brief survey shared on various professional email lists, social media, and through snowball sampling. They each received a $100 gift card as an incentive. We found that increasing the incentive to this amount for a maximum of ninety minutes of participation was effective. We considered further time and capacity restraints for participants, such as at-home childcare, due to the pandemic that may have impacted participation. Additionally, it is common for BIPOC faculty to have additional responsibilities yet less job security and compensation compared to white counterparts (Lin & Kennette 2022). The semi-structured interviews included questions formed from our observations of faculty perceptions as librarians, existing literature, developments in the scholarly communications landscape, and issues that specifically impact BIPOC people such as bias in the publishing process. We refined the questions after the pilot focus group, particularly reducing assumptions that faculty were more aware of nuances in OA and had previously published open access. Our instrument focused on perception questions rather than asking explicit questions about specific microaggressions and discrimination faced already in their department, campus, or discipline.

We recorded the audio using Zoom software. We hired a research assistant to transcribe and edit the transcripts for accuracy and clarity. Participants were asked to disclose their racial and ethnic identities, as well as gender, professional status, discipline, and institution size. We analyzed results by identifying themes and subthemes emerging from perceptions and lived experiences, according to grounded theory. For the full data collection, we first conducted quality control by comparing audio recordings to the transcripts. We analyzed the transcripts separately to identify themes and subthemes according to topics from the focus group questions, then compared and synthesized notes to generate our results. We gave participants an opportunity to request transcripts, but none did. We also asked participants to reconsent in order to potentially deposit the anonymized focus group transcripts in a qualitative data repository.

For the purposes of this article, we gave weight to participants' responses based on more than mere frequency as "sometimes a really key insight might have been said only once in a series of groups" (Krueger & Casey 2000, p. 136.) We favored comments said with a high degree of specificity (rich in detail), emotion (enthusiasm, passion, or intensity), and/or those that came up extensively (said by many different people, rather than comments that may have high frequency by just one person) (Krueger and Casey, 2000.)

Results

Demographics

TABLE 1
Gender

32	Women (including "female, femme, woman, cisgender woman," etc.)
6	Men (including "male, cisgender man, transgender man," etc.)

Of our thirty-eight participants, thirty-two self-identified as women (including "female, femme, woman, cisgender woman," etc.), and six self-identified as men (including "male, cisgender man, transgender man," etc.)

TABLE 2
Race/Ethnicity

15	Black (either African, African American, Afro-Caribbean, or AfroLatinx)
5	Asian (either Asian American or from specific Asian nations)
6	Latinx (either white Latinx, Brown Latinx, or mestizo)
4	Native or Indigenous (from various nations)
8	Mixed or biracial

When asked to self-identify their race and/or ethnicity, fifteen participants self-identified as Black (either African, African American, Afro-Caribbean, or AfroLatinx). Five participants self-identified as Asian (either Asian American or from specific Asian nations). Six participants identified as Latinx (either white Latinx, Brown Latinx, or mestizo). Four participants identified as Native or Indigenous (from various nations). Eight participants identified as mixed or biracial.

TABLE 3
White-passing and/or White-presenting

6	Yes
32	No

When asked if they self-identify as white-passing and/or white-presenting, six participants stated yes and thirty-two stated no.

TABLE 4 Institution Size	
5	small/private
2	mid-size/private
5	small/public
8	mid-size/public
18	large/public
As for institution size, the majority of participants were employed at large, public institutions (n=18); eight at mid-size, public institutions; five at small, public institutions; five at small, private institutions; and two at mid-size, private institutions.	

TABLE 5 Institution Type	
33	University
2	Community college
2	Liberal arts or teaching college
1	Unknown
As for institution type, the majority of participants were employed at a university (n=33), the minority at colleges (n=2 community college; n= 2 liberal arts or teaching college; n=1 unknown.)	

TABLE 6 Institution Demographics	
29	Predominantly White Institutions (PWIs)
9	Minority Serving Institutions (MSIs)
Twenty-nine participants worked at Predominantly White Institutions (PWIs). Nine worked at Minority Serving Institutions (MSIs,) including Hispanic Serving Institutions (HSIs), Historically Black Colleges and Universities (HBCUs), and universities in nations with non-white populations. Of those who reported employment at a PWI, four indicated higher rates of diversity at those institutions or approaching MSI status.	

TABLE 7 Disciplines	
5	STEM
10	Humanities
13	Social Science
10	LIS/Librarian/Archivist
As for discipline, five participants identified as STEM faculty, ten as humanities faculty, thirteen as social science faculty, and ten as librarians or archivists.	

TABLE 8 Institutional Status	
20	Assistant professor
9	Associate professor
4	Full professors
4	Contingent positions (i.e., lecturer, adjunct, etc.)
1	Undeclared
Our sample included twenty faculty in the assistant rank, nine associates, four full professors, four in contingent positions (i.e., lecturer, adjunct, etc.) and one undeclared.	

Wide Familiarity with Open Access

For the purpose of this study, we defined open access (OA) for our participants as the "free, immediate online availability of research articles, coupled with the rights to use these articles fully in the digital environment. Open access ensures that anyone can access and use these results to turn ideas into industries and breakthroughs into better lives." When asked whether they were previously aware of open access, only a handful of participants were new to the concept of open access. The vast majority of our participants had knowledge of OA prior to this study. Of this majority, there was a wide range of familiarity expressed. Some had simply heard of the concept in the past without fully understanding its implications and felt like complete beginners. Many first learned of OA in graduate school, either through direct outreach (for example, emails from librarians to deposit in the institutional repository, library-sponsored OA Week workshops, and/or covered publishing costs) or by being required to make their dissertations and theses accessible as a graduation requirement (even if they weren't told of their option to publish articles based on their research as OA). A few participants work in institutions where OA is promoted heavily by the college or university administration (even if some are skeptical about campus or departmental support of OA publishing when it comes to tenure and promotion) or explicitly through OA mandates. Others first learned of it when asked to review articles in special OA journal issues for major publishers, or new or existing OA journals, particularly in STEM fields. A few mentioned learning of OA for the first time through grant-funder requirements, or by receiving OA publishing agreements directly from journals. Others have used OA resources as required texts in their teaching (such as intentionally created open educational resources). A few discussed becoming aware of OA debates in venues such as *The Chronicle of Higher Education*. One participant elaborated that

> The article, if I remember correctly, was really based on looking at or exploring some of the advantages and disadvantages of open access. And with an emphasis really on who bears the burden financially of this structure of publishing. And I think at the time, I didn't fully understand that—how the burden could then be placed on the researcher until I started getting all of these invitations to publish under this idea of open access.

Some mentioned that knowledge of OA was a prerequisite of starting a new job (for example explicitly stated in a job advertisement), either in a discipline or organization where it is discussed and advocated for frequently (such as in library science, or in the library and archives professional communities, respectively). The accessibility of OA scholarship was also an ongoing consideration for our participants who work in disciplines such as Ethnic Studies, where access to research products can be negotiated as an aspect of community-engaged research. One participant detailed learning of OA through lack of institutional access to research while working outside of academia, explaining that they recognized the only scholarship they could reference and use freely actually incorporated the term. OA was also introduced to a few participants who work in technology (or are extremely online, aka an "internet geek," as one participant mentioned), due to its relationship with other open concepts such as open-source software.

Mixed Acceptance for Open Access Publishing

When asked if their discipline encouraged open access publishing, some participants expressed that yes, their disciplines did support it, even if they weren't aware of all the OA journals in their fields. They came to that conclusion through a variety of assessments. For example, a reviewer for a major social science journal publisher noticed that it had started an OA journal, through which many established scholars started to publish. One participant stated that OA publishing was suitable at their teaching-intensive institution because publishing was not a mandatory requirement for tenure and promotion. Another participant noted that in their specialized STEM field, OA is highly encouraged, even though there are sometimes exorbitant fees charged by journal publishers (however, increasingly fees are not charged by more and more journals in that discipline). Some participants echoed that because many in their fields have funding from the National Institutes of Health, OA publishing is mandated (whether the journals charge or not) and it's now "part of the DNA." One participant discussed how open access was debated during the graduate program specifically as an active commitment in their interdisciplinary humanities field, stating,

> A lot of the kind of cutting-edge stuff that was happening…in the early 2010s was around digital humanities, digital studies, game studies. And so a lot of the work that we learned as graduate students was how to access open access. And, you know, really having to commit yourself. …you're kind of in an uphill battle, other people may not respect your work, even if you know they use it in their classrooms and it's the most accessible.…

However, it was still diminished as "…on the bottom of the list of things that you need to do as a graduate student trying to get a job or whatever." Another participant stated that OA publishing was encouraged in their specialized humanities subfield (but not their broader field), particularly by scholars of color, "as a means to give access to communities from which these things are coming." One noted that in their STEM discipline, active discussions around the high journal costs and the lack of compensation for peer review generates an active conversation in support of OA, stating,

> This doesn't make sense. We are the ones providing the content, and we are also the consumers. Why do we need these middlemen just skimming off our work? And so in that sense, it is being encouraged, saying there's a lot of very vocal people trying to move everybody to promote open access.

However, within their own multi-institutional research teams, OA is not frequently discussed—whoever's institution can afford to pay for APCs does. Another participant mentioned that though OA is encouraged in their subfield of clinical psychology as a social justice issue, there are active conversations about OA as indicating predatory or less rigorous journals.

Several participants stated that OA publishing was discouraged in their disciplines. One participant stated that even though OA is completely aligned with the goals of their social science discipline, it's not promoted despite it being common practice to share knowledge and make research available by letting people sit in on classes and giving free lectures. Oth-

ers mentioned that OA journals are listed on their professional association website, but not promoted or spoken of in meetings or otherwise. Venues that were likely to be OA are special calls for papers (dedicated journal issues). Several participants stated that their disciplines discouraged OA publishing, possibly because there was a perceived difference in quality between OA and closed journals in their fields. Another said that peer review of the journal, whether it was OA or closed, was key to its acceptance as a credible venue in their department, institution, or field. One mentioned that OA publishing in their social science field and health science subfield is viewed as a social justice issue, but that the overall perspective of OA journals is that some are predatory, suspicious, or not credible.

Conflicting Messages about Open Access Publishing

Others said that they were unaware of peer-reviewed OA venues in their traditional humanities disciplines (philosophy, literature, etc.), and that any would likely be perceived as of lesser quality than closed journals, but again, that interdisciplinary offshoots (such as digital humanities or game studies) respect and promote OA publishing fully. A participant detailed that

> [t]here's definitely and certainly still a stigma associated with open access publishing in my discipline. I think that my discipline prides itself on, you know, the rigor of its research and also the exclusivity. So publishing in an open access journal and online formats is seen as a kind of a derogatory form.…

Connected to the idea of rigor is the journal impact factor, which a few participants mentioned is emphasized in their disciplines when considering which journals to publish in. A few participants mentioned that as tenure-track faculty, they could be strategic about publishing in a mix of journals, including OA, as long as the mix included high impact journals. Interest at the discipline level, but not at the institutional level, surfaced through responses to this question. One participant revealed that within their department, though OA is not encouraged, it is accepted as a full publication, while some colleagues at other universities have been told explicitly that OA publications do not count at all towards tenure and promotion. Another noted that OA has a mixed reception in the anthropology field, and that though most journals are closed, open journals get the most traffic. One participant, who works across multiple humanities fields, described OA publishing as not part of the mainstream conversation in any of their fields, save a "random panel at MLA [Modern Languages Association conference]" and that colleagues at more competitive institutions are pushed to publish in very specific, closed top journals. Whether their discipline was primarily a book field or journal field was also highlighted as a reason why OA acceptance lacked clarity or was mild in their field.

A few participants stated that they were not sure whether OA was encouraged in their discipline, either because their interdisciplinary focus was still very new or because they were aware of the comparison of OA to teaching journals in their field, which are viewed as second tier venues they are discouraged from publishing in. Another participant described how even though OA is discouraged in their discipline, publishing OA depends on

> …what your motivations are with your work. So as someone who is concerned about community engagement and having open dialogue and making sure that the material in your research connects with the constituents and with the com-

> munities that your theories are about—you want to, and you're thinking about how to make this work more accessible. And so open access looks more appealing to you for that reason.

One participant described being unsure because their field "loves to encourage open access, but then a lot of our journal publications are not open access. I think that's starting to change. There was a lot of 'talking the talk', but not 'walking the walk' too."

Institutional, Disciplinary, and Professional Factors in Open Access Publishing

When asked if they were familiar with OA publications in their discipline and/or ways of making their work OA, the vast majority of participants stated yes, they were aware of open access prior to participating in this research. Of this group, awareness of institutional or disciplinary repositories as a venue for OA publishing was split. Interest in or capacity to publish OA varies among participants, and common determinants are institution type and support for nontraditional publishing; the suitability, saturation, and credibility of (or posturing towards) OA within their disciplines; and future career aspirations.

One participant stated that though they had heard of OA, information about it wasn't commonly shared as a publishing option at their R1 institution, and that was largely "tied to some of the stigma and a push to be published in other locations." Another participant detailed that reception and practice are mixed, and that OA is valued at their teaching institution because the content is valued but it's still a hard sell:

> As at a teaching institution, my university is moving towards accepting for tenure and promotion a wider variety of types of publications. I think in that way, we're aware, for example, of including other types of things counting for research. For example, you could be writing about community engagement and doing something that [within the discipline of] history, I think has traditionally not been valued. So I think that's shifting. But in terms of publishers, in terms of discipline overall—like who's going to get hired—I think there's still a sense of there are certain journals and there are certain university presses. And I think from there it's difficult to publish something open access through a lot of those publishers.

Another participant reiterated that their awareness of OA stemmed from teaching with open materials as a way to make course content more accessible (i.e., affordable) for students:

> When I got into the PhD program, they started to talk about having the importance of a high research impact score and then open access quickly had some weight as being less significant than other sources, and so it actually isn't encouraged too much in our discipline. But there is a push right now towards making sure that there's a social impact for content and this divide between research, publishing, and actually getting out there to [social science discipline] practitioners. And so we're starting to see a shift that's emerging. Moving to more open access resources as far as publishing, they're not valued as much when tenure considerations are

> happening. But as far as getting content out more quickly, there's starting to be a stigma around the delayed nature of getting information out in [closed journals] because the information is already dated once it's actually published. So I'm starting to see a shift, for sure.

A couple of participants, aware of OA and publishing venues in their own disciplines, questioned the suitability of their own research for OA publications. For example, one participant described that within the education discipline, many OA journals are trade journals focused on K–12 and their practitioners. In contrast, another participant detailed with excitement how credible the top OA journals that saturate their field are for their work:

> …I looked at some of the journals that I publish in and a lot of my journals are Canadian journals…one I'm about to submit an article to is a journal called [a well-known history journal] and they are an open access journal. But they also have been around [for decades] and have a really excellent reputation.… So for me, I'm not exactly worried. I'm not worried about being published in open access journals, particularly because most of what I'm doing, most of the journals I'm publishing in are Canadian journals. And they also have the principle around open access at [my R1 university].… There is [named an institutional repository] which is in the digital environment for access to learning and scholarship and we can put our articles or research in it so people can have access to it…but I also wonder about how we think about Academia.edu, if that could also be considered open access because I have, in the spirit of accessibility, put quite a bit of my articles in that."

A few participants agreed that the library science discipline in particular contained "fewer journals that allow you to [publish OA] than you would think, considering the rhetoric in the profession." Another went on to detail a possible reason why there was posturing in the field, reflecting that

> …there are a few up-and-coming library journals that are open access, but they're definitely in the margins. And it's interesting to me to think about how librarians were really promoting open access quite heavily to other disciplines. But then in our own library scholarship, we're still really relying on pretty traditional journals, and there isn't as much of a focus on impact stories the same way there is in the other disciplines. But it's definitely, I want to echo other commenters' remarks in terms of tenure track and the perception that, if a CV submitted was entirely open access published articles, I think would be viewed with some incredulousness. And so for libraries, I also am not aware of any particular open repository, which kind of makes its own challenges. And so I think you see people engaging with what they have, either through their institution or what their institution just does as a whole.

Several participants became aware of open access in their discipline and ways of making their work OA not through their own research but instead via solicitation from legitimate and predatory open access journals to perform peer review or to submit work, particularly

after they presented at conferences. One participant detailed their reaction to this approach, stating that it lacked credibility because

> …one of the things that people often tell me about open access, and you read a lot about too, is that there are a lot of predatory or not really legitimate ones that you might use. Like definitely when people email me, I automatically assume that it can't be something that's legitimate, right? So I think that makes it hard to be encouraged, either when people are always kind of telling you you don't know if you can trust open access publications.

Another participant reiterated that their awareness of OA stemmed from predatory journals lacking in credibility, and how that led them to distrust OA publishing generally:

> The other thing also [that] leads to this stigma are the countless emails that you receive asking you to publish your work in open access journals that look quite sketchy. And that also leads to a kind of a distrust or mistrust of these platforms as kind of pliable and professional mediums and platforms to publish your work. So I can tell you that I did my master's program in [early 2000s], and since then, as soon as they knew what I was specializing in, I kept on receiving emails asking me to submit to these open access journals and so then I was advised to kind of reject them or to ignore them. And I am. I am actually familiar with a few of the venues in my discipline, but I don't know anything about the self-archiving repository.

But this apprehension is not universal among participants because acceptance of paying to have your research published in traditional journals (in general or specifically through an OA option) or OA journals varies across disciplines. (It can be more common to pay for membership or contribute to operational costs for a professional society, which then serves as a prerequisite to publishing when the organization also serves as the primary publisher for publications on a niche area of study.) A couple of participants were surprised to learn that this practice is credible and acceptable in any discipline, because in their fields it's frowned on to pay for publishing research. One participant stated that because OA had been a practice in their discipline for several decades, that they'd never had an OA journal ask for payment, and that for them it would be "an indication that the exchange of money [would discount] the intellectual, scholarly thing you are doing. And so these are some of the things that bring doubts to people embracing and openly accepting open access journals." Another participant confirmed that OA journals are very much accepted as viable options to publish in their discipline because their major associations and conferences release OA publications (such as proceedings, white papers, or journals). However this credibility isn't extended to OA publications in their discipline not released by those same organizations.

Finally, apprehension around future career aspirations was named as a reason why a few participants, who were aware of OA and venues for publishing their work OA, refused to. One participant stated that

> …even though I'm at a teaching institution in which that kind of publication would be valued, as well as other types, and I've been able to get tenure without having a lot of publications in top tier journals. I think just instinctively due to my training or my background—what's valued in the discipline overall and the realities of what I would need in order to, at least that's how I feel, if I were to try to get a job someplace else, automatically look towards trying to find a recognized or a top tier journal to publish in. So, I guess in that way, I'm sort of self-censoring.

Another participant detailed their understanding of why faculty who are aware of OA and venues for publishing OA, such as institutional repositories, avoid them, namely, because they fear that their materials and intellectual property will be plagiarized and/or stolen, impacting the viability of their future research and publications.

When asked if they were familiar with OA publications in their discipline and/or ways of making their work OA prior to being contacted to participate in this research, a handful of participants stated that no, they were not or that they were unsure. For those that stated no, most discussed being more willing to research open access journals in their disciplines (or depositing in an institutional repository) and explore publishing in them since participating in our study. For the few who were unsure prior to their participation, they were confused as to whether websites they uploaded their work to, such as academia.edu or ResearchGate, counted as open access. This confusion largely came down to the language used by websites and journals being too similar to open access terminology. There's also misunderstanding around whether their free access to research via institutional affiliation, such as access points via an academic library's online interface, can obscure whether or not the research is open access or paid for, and who is ultimately paying for it.

When asked if they were familiar with grant requirements for making publications OA, a couple of participants stated that they were aware, but have not applied or that the requirements (at that time) were not relevant for their field. When asked if their college or university has adopted an open access publishing requirement, several participants stated no (however, we later discovered several of the participants' who gave a negative response to this question did in fact have open access policies at their institutions.) Some mentioned that it has been encouraged on campus by making APC funding available, but that it was still not required despite ongoing conversations (about whether it was possible to mandate, about who would ultimately pay the APCs, etc.) and growing awareness on campus. One participant emphasized that the requirement was adopted and funding made available through strong advocacy by their union. Another participant described a growing conversation around integrating OA publishing explicitly into their departmental merit, promotion, and tenure requirements (even though the university doesn't require OA publishing) because of the importance of OA for researchers in the Global South. One participant mentioned that there is explicit pushback at their campus and at the state level about mandating an OA requirement rather than offering guidance promoting OA. Another stated that OA isn't discussed in high regard at their institution but that they personally advocate for it within their department, explaining that

> [o]pen access on a personal level, it's something that I've adopted and that I've told my department, "Hey, this is something that I am interested in doing because, you know, the publishing paywall to get to your own article." Sometimes if your

> institution doesn't have that under their library resources it's huge. You know, sharing that work with other friends, making sure that it's useful for them, there's reasons to adopt open access publishing. But thus far, I don't think it's a practice that's gotten traction.

When asked if their employers supported open access publishing financially and if there were any challenges in accessing that funding, we received a range of responses, from not knowing to no support, inadequate support, and full support. Some mentioned that support is available through small OA awards administered by the library that are quickly depleted at the start of the program period. Some faculty stated that funding for APC charges would have to come out of any departmental or startup funds available to them, and that some faculty pay using their personal funds. A few participants mentioned confusion as far as knowing what support was available; one participant stated that asking on campus would be like opening a Pandora's box.

Limitations

Limitations of our study include its high concentration of participants from North America, rather than a more international sample. Our participants are largely in humanities, social science, and public health; we would have preferred a higher participation rate from STEM (i.e., science, technology, engineering, and mathematics) faculty. A broader range of STEM faculty would better represent how much variation in support and engagement exists for open access publishing among these disciplines, particularly in the hard sciences. Additionally, librarians and archivists were overrepresented in the sample. Future research should include a more international participant pool across a wider selection of disciplines and ask more questions that speak toward the nuances of OA publishing, such as self-archiving and policies, which would provide broader insight into anti-open discourse and policies.

Discussion

Participants in this study identified informal messaging and experiences with the publishing process that illustrated inequities in the scholarly communication landscape. BIPOC faculty expressed that they are explicitly and/or implicitly required to do additional work to meet the requirements of promotion and tenure in order to intentionally publish open access. Although the study did not focus on participants' specific experiences with exclusion, microaggressions or systemic injustice, these themes did arise in some participant responses reflected throughout our dataset.

Unlike Dalton, Tenopir, and Björk's (2020) findings for humanities and social science faculty in North America, faculty in this study did perceive an impact on research communities and public good outside of academia. This could be due to growing awareness of open access in general, growing awareness in the humanities and social sciences in particular, and/or the impact participants' positionality has on their perspectives as faculty holding one or more marginalized identities. Awareness of open access is inevitable when joining certain disciplines, such as those that center the Global South, because of the reality of academic publishing in those regions. For example, a few participants expressed how collaborating with scholars or students outside the U.S. alerted them to how much institutional access to scholarship they enjoy themselves. This echoes concerns as to whether researchers in the Global South are able

to participate fully in the current economy of scholarly communication and the reality that passwords and paywalls limit access and inevitably privilege more affluent institutions and scholars who can afford subscription-based journals (Richardson, McLeod, & Hurst 2019). However, it is evident that increased awareness has not resulted in increased open publishing practices in these disciplines generally. Although only a portion of humanities and social science BIPOC faculty published open access articles before the study, several participants reported gaining familiarity with open access through digital humanities. Previous perception studies identified altruism and public good among faculty motivation for or values alignment with open access publishing.

Perception studies after 2015 demonstrate how polarized attitudes toward open access are among faculty researchers and scholars. Studies from 2004 to present attribute faculty perceptions and motivations for adopting open access to a lack of awareness or misunderstanding (Gaines 2015). Our results demonstrate that it is important to define and distinguish between awareness and understanding. Participants in our study were aware of open access in a general sense but were unclear about the nuances in identifying what made a work open access (e.g., licensed library resources versus Research Gate), what resources or policies in support of open access were available at their institution, and how to intentionally practice open access publishing (particularly outside of the gold open access model, as they were not familiar with self-archiving). Additionally, our study found that as open access develops it becomes even more nuanced. Participants were also split when it came to perceptions of the process and quality of open access publishing. These responses align with the split on quality discussed by Richardson, McLeod and Hurst's study, in which a third of faculty believed that articles in open access journals undergo the same review process as articles in traditional journals, and agreed with the premise that open access journals had the potential to be high quality and rigorous, even if that was not always true in practice. We implore that open access advocates and researchers no longer treat open access publishing nor faculty as a monolith (Dominik et al. 2020).

Previously in the scholarly literature, the emphasis was only on collecting data by discipline or on a generalization of attitudes. Although some studies were conducted in nations with large non-white populations, they did not provide qualitative examinations of how perceptions of open access may be informed by regional, racial, or ethnic identities. Studies on knowledge equity demonstrate how identity and location provide very different contexts for researchers' values, resources, and practices (Chan 2019). We find this extends to open access publishing. Generalized studies of faculty perceptions discussed motivations to provide access to colleagues to advance their field and general public good. The discrepancy between researcher and traditional values was revealed to be a systemic barrier to equity in academia, traditional academic publishing, and open access publishing.

Again, this risk-aversion aligns with previous studies that refer to the paradoxical perception that early career faculty are better suited to engage with newer models like open access, but are considered vulnerable to risking tenure if they engage in unconventional practices. For example, one participant in our study stated that

> …at the institutional level, I happened to go to the same grad school where I'm faculty now and I learned about open access journals as a grad student and about, you know, all the philosophy behind it and why it's so important.…and our library

> web page has a whole page dedicated to it. But in practice, at the faculty level, I haven't been encouraged, not required and not even encouraged, to publish in open access. And I would get the sense that it would again be more frowned upon than celebrated.

In our literature review, APCs were identified in most studies as a primary concern, alongside concerns for earning promotion and tenure, and this was echoed by our participants. Faculty associated open access with the high cost of article processing charges and perceived the burden of cost on individual researchers and scholars. Gold and hybrid open access models were more well known to faculty, with only a minority in general perception studies and BIPOC faculty aware of self-archiving or green OA.

There is a need to realign messaging, principles, and practices to decenter legacy values for knowledge and knowledge sharing. New roles may emerge for librarians as advocates for the acceptance of legitimate, non-traditional scholarly publishing outlets as a part of campus-wide tenure and promotion review policies (Dalton, Tenopir, and Björk 2020). Advocates could also conduct outreach to specific disciplines that do not engage as often with open access publishing and retain misconceptions such as lack of peer review. Funders and institutions are well positioned to leverage negotiating, policy-setting, and incentive creation power to provide support and even constrain APC costs (Khoo 2019). Since 2020, new initiatives to advance open access such as Coalition for Diversity and Inclusion in Scholarly Communications (CD4dsic), Higher Education Leadership Initiative for Open Scholarship (HELIOS), All4OA, and National Academies of Sciences, Engineering, and Medicine's Open Science Toolkit demonstrate more collaboration among institutions and professional associations in North America.

Conclusion

This study serves as a snapshot of a turning point in the landscape of open access in the United States in 2020. Familiarity with open access appears to have increased over time, yet it remains nuanced, polarizing, and complex to put into practice, including for marginalized scholars. Responses from our study show conflicting attitudes and associations with open access as costly and risky yet supportive of research communities. Faculty researchers and scholars remain as Dalton, Tenopir, and Björk phrased it, "shackled by convention"(2020). Without systemic incentives or support, barriers for faculty, particularly BIPOC and other marginalized faculty, are likely to persist. Current incentives do not reflect emerging researcher values, public impact, and public regard of research changes. Additionally, some barriers such as fees tend to exist outside the academy. There are opportunities to co-create open publishing systems and support that better reflect researcher and research community values.

Appendix A: OA BIPOC Focus Group Questions

1. Were you previously aware of open access?
2. Is open access publishing encouraged in your discipline?
3. Has your employer adopted an open access publishing requirement?
4. Is there a culture of support around open access at your institution?
5. Have you published in an open access venue?
6. If you haven't published open access previously, do you plan to in the future? If not, why not?
7. How do you think publishing open access would impact your tenure or career trajectory?
8. What is your perception of the quality of open access journals/scholarship?
9. What, if any, biases have you noticed in publishing (region, language, marginalized topics)?

Appendix B: Table of Participant Disciplines

Disciplines
Africana Studies
Political Science
Sociology
Public Health
Archives
Psychology
Library Science
Multidisciplinary Studies
Global Studies
English
Gender Studies
Health Sciences
History
Education Policy
Social Work
History of Science
Philosophy
Native Art History
Sociology
American Studies
Education
Spanish Language
Biology
Latino Studies
Anthropology
Chicano Studies
Communications
Other/Unknown

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