

Criteria Category	Not Applicable	Inappropriate: 0	Low priority: 1	Medium priority: 2	High priority: 3	Score	Support for Ranking
Cost	N/A	<ul style="list-style-type: none"> - Very high cost range or percentage increase from existing agreement. - Cost requirement not transparent. - Not able to determine how investment will be used. - Cost-per-material not provided (when applicable). 	<ul style="list-style-type: none"> - High cost range or percentage increase from existing agreement. - Difficult to calculate annual costs. - Unclear how costs will escalate from year to year. - Cost-per-material not adequately provided (when applicable). 	<ul style="list-style-type: none"> - Reasonable cost range or percentage increase from existing agreement. - Costs may be ongoing long-term but will not preclude possibility of similar deals with other publishers. - Some cost-per-material details provided (when applicable). 	<ul style="list-style-type: none"> - Reasonable cost or percentage increase with high impact relative to value. - Cost savings are clear relative to existing agreement or alternative content source (ex. book aggregator). - Cost is dynamic and likely to decrease if more institutions commit to funding. - Costs not required in perpetuity. - Cost-per-material provided (when applicable.) 	2.5	<ul style="list-style-type: none"> - No increase in pledge fees from Phase II to Phase III - Membership model specifies pledge fee decrease if there is a net membership gain (over the prior phase) beyond the total budget needed - Phase III agreements are for a 3-year term, not in perpetuity - Consider "value for your values"--the "value" of your dollars gained by supporting an initiative that in turn supports its member libraries' values (https://www.leverpress.org/join)
Sustainability & Risk	N/A	<ul style="list-style-type: none"> - Investment will not contribute to sustainability of content or service. - Business model roadmap not developed or offered. - Risk outweighs benefit. 	<ul style="list-style-type: none"> - Unlikely investment will contribute to sustainability of content or service. - Business model roadmap inadequate. - Potential risk outweighs benefit. 	<ul style="list-style-type: none"> - Potential for investment to contribute to sustainability of content or service. - Business model roadmap developed or in development. - Some risk, but offset by potential benefit. 	<ul style="list-style-type: none"> - Funding will support not only content or service, but development of sustainable business model. - Business model roadmap developed and provided. - Support would positively influence other publishers, funders, peer institutions. - Acceptable level of risk. 	3	<ul style="list-style-type: none"> - Lever's funding model is designed to share the costs of running the press equitably among its members, and is unique in that it is a press governed by its participating members - As a fully open access "Platinum OA" press, all associated costs are borne collectively by its supporting member institutions. Member funding directly supports the acquisition, production, and hosting of content, making it free to authors and their sponsoring institutions to publish, and free to read to all - The membership model is described on Lever's website, along with the pledge fee tiers - The more institutions who join, the lower the pledge amounts potentially will be for all members, and the more freely accessible scholarship can be made available for the public good (https://www.leverpress.org/join) - Business model benefits those who need access to information and those who produce the research. (Making the Case for Lever Press https://www.leverpress.org/assets/making-the-case-for-lever-press.pdf)

<p>Potential significance of OA content</p>	<p>N/A</p>	<ul style="list-style-type: none"> - Content is not open. - Lacks relationship to local research and teaching. - No local usage statistics provided. 	<ul style="list-style-type: none"> - Evidence or potential for low local usage, though may still be valuable to specialized researchers. - Few or no marketing materials available. - No local usage statistics provided, but may provide aggregate usage statistics. 	<ul style="list-style-type: none"> - Evidence or potential for strong local usage in research. - Reasonable potential for local usage in teaching and instruction. - Some marketing materials available. - Some local usage statistics provided, or plans for providing local usage clearly outlined. 	<ul style="list-style-type: none"> - Content focus with direct relevance to library's subject priorities/strengths. - Materials currently or likely to be adopted for course use. - Content is discoverable and accessible. - Added-value services such as course alignment and rich marketing resources. - COUNTER-compliant usage statistics provided. 	<p>3</p>	<ul style="list-style-type: none"> - "As a press aligned with the ethos and mission of liberal arts colleges, we seek out, identify, evaluate, and advocate for transformative scholarship that spurs creative dialogue within and between traditional fields of inquiry, emphasizes disciplinary innovation, draws upon new models of collaborative research, and strives to reach the broadest audience possible." (Our Values https://www.leverpress.org/about#values) - Lever's growing areas of subject expertise—media studies, history and cultural studies, Asian studies, pedagogy and education, literary studies, musicology, women's and gender studies, race and ethnic studies—reflect a broad spectrum of subject collecting areas common to many academic libraries, especially those focused on the liberal arts - Lever Press is focused on publishing books that have classroom and public educational value. It includes works about the undergraduate classroom, about the academy and how to change it, books that can be used in college courses, and scholarly books with general audience appeal. (Why Authors Publish with Lever Press https://www.leverpress.org/stories/2024-07-29-why-authors-publish-with-lever/) - Lever Press supports accessibility by requiring alt-text for images and transcripts for audiovisual material - Objects are discoverable via the use of DOIs; usage and impact are core to Fulcrum's platform design. Lever Press titles are delivered to book indexers, library discovery services, and platforms including JSTOR Open, Muse Open, Open Research Library, and OAPEN. MARC records are made available for free download from the website under a CC0 license - Authors have the flexibility to include additional materials on their book's webpage that don't appear in the book itself, such as additional images, course syllabi, and assignment worksheets - Marketing collateral on the books' landing pages (e.g., The Detroit Genre) such as book reviews, interviews, a "Recommend to Your
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							<p>Library" link, links to Lever Press social media accounts, and downloadable covers and book flyers make it easy to amplify marketing efforts and learn more about the content. Book releases are also announced to the pledging members and on Lever's News section of the website. Bi-annual digital catalogs highlight recent and forthcoming titles and are freely available on the website.</p> <ul style="list-style-type: none"> - A "Stats" tab on the Fulcrum book landing pages displays COUNTER usage on the Fulcrum platform via IRUS, while the Book Analytics Services' dashboard on Lever's Impact web page displays usage data from multiple platforms and is geared specifically to OA books (https://www.leverpress.org/impact/)
Ethical publishing practices & value to authors	N/A	<ul style="list-style-type: none"> - No clear use or benefit to member institution authors. - Lack of transparency in scope and review process. - High risk of damage to author reputation. - Potentially predatory or fraudulent. 	<ul style="list-style-type: none"> - Few member institution authors would benefit. - Benefit may be negligible (ex. APC discount under 10%). - Authors may publish under restrictive open license (e.g. CC BY-NC-ND). - Some risk of negative impact to author reputation. - Ethical publishing practices not made evident. 	<ul style="list-style-type: none"> - Evidence of member institution authors publishing in relevant venues. - Authors retain rights and may publish under permissive open license. - Evidence of value-added author services. - Likely to enhance author reputation. - Moderate level of ethical publishing practices evident (ex. COPE member). 	<ul style="list-style-type: none"> - Strong evidence of interest in relevant venues. - Authors publish OA and retain rights without costs. - Added-value author services (e.g., translation, multimedia support). - Enhances author reputation. - Demonstrates best practices in scholarly publishing (ex. Follows OASPA principles). 	3	<ul style="list-style-type: none"> - Multiple Lever Press authors have been interviewed on the New Books Network and other outlets, and many of its titles have been reviewed in well-known publications such as Bryn Mawr Classical Review, Kirkus Reviews, and Music and Musical Performance: An International Journal. Several Lever Press titles have also been nominated for awards: <i>Urban Fantasy: Exploring Modernity through Magic</i> - Finalist, Non-Fiction Category of the Locus Awards; Finalist, British Science Fiction Association Best Non-Fiction Longlist <i>La Princesse de Clèves by Lafayette: A New Translation and Bilingual Pedagogical Edition for the Digital Age</i> - 2024 Scholarly Edition in Translation Award (Society for the Study of Early Modern Women and Gender); 2023 PROSE Award Finalist in the category of Best eProduct (Association of American Publishers) - All Lever Press titles are open access; authors retain copyright and publish under a CC license of their choosing, with no cost to them or their institutions - Born-digital approach and publication on Fulcrum platform enables authors to publish digital scholarship not well served by print-focused publishing alternatives - Authors have ability to enrich their content through use of multimedia (images, videos, audio files, visualizations, etc.)

						<ul style="list-style-type: none"> - Authors are paid a \$1,000 honorarium, receive gratis print copies of their work, and can purchase additional print copies at a discounted price - Although Lever Press is a relatively young scholarly publisher, its profile among scholars in its subject lists is growing, its series editors are among the top scholars in their fields, and many authors decide to publish with Lever based on the strength of works it previously published, and word-of-mouth recommendations from its published authors - Lever Press is a member of the Association of University Presses, and is guided by principles such as The Tempe Principles for Emerging Systems of Scholarly Publishing (https://www.arl.org/resources/principles-for-emerging-systems-of-scholarly-publishing/) - All publications undergo peer review, and are approved by an Editorial Board whose members are vetted and approved by its governing body, the Lever Press Oversight Committee - High degree of transparency throughout the publishing process, e.g. <ul style="list-style-type: none"> * peer review process for each project is signaled in a clear, consistent way * the editorial process is clearly described on the Publish With Us section of website (https://www.leverpress.org/authors) * website links to downloadable author proposal guidelines, manuscript preparation guidelines, author and contributor agreements, and other helpful resources - Metrics, tracking, and discoverability are built into the Fulcrum publishing platform
Equity & mission	N/A	<ul style="list-style-type: none"> - Not aligned with Libraries' mission. - Does not strive to transform or interrogate legacy publishing models. 	<ul style="list-style-type: none"> - Commercial publisher. - No clear commitment to representation or inclusion, though content may still support wide range of research and teaching. - Minimal transformation of 	<ul style="list-style-type: none"> - Nonprofit or commercial publisher. - Program will benefit communities beyond member library. - Some evidence of commitment to DEI, including representation of BIPOC, women/nonbinary individual, international 	<ul style="list-style-type: none"> - Nonprofit publisher. - Program will benefit communities beyond member's institution, especially less-resourced institutions. - Publisher has a clear commitment to equitable publishing practices (ex. C4DISC signatory). - Published content developed in partnership 	3 <ul style="list-style-type: none"> - The Lever Initiative is a 501(c)(3) non-profit entity - Lever's membership model anticipates that a net membership gain (from the prior phase) will result in reduced cost allocations for all members in years 2 and 3 (depending on the total budget needed for those years); these cost reductions would be especially beneficial to less well-resourced member institutions - The Platinum OA nature of Lever's publishing model reduces the financial burden on institutions and their libraries, since there is no

			<p>legacy publishing models.</p>	<p>perspectives.</p> <ul style="list-style-type: none"> - Moderate transformation of legacy publishing models. 	<p>with underrepresented source communities.</p> <ul style="list-style-type: none"> - Program will transform legacy publishing models. 	<p>cost to publish with Lever, and no cost to access the content. The more institutional member support that Lever Press has, the more high-quality open scholarly content it can publish, for the public good</p> <ul style="list-style-type: none"> - Lever Press strives to pay fairly for the work of publishing at all stages—authors, peer reviewers, Editorial Board members, staff, and vendors/subcontractors - Although the focus is on digital publishing, whenever possible books are also made available in a print on demand format at affordable prices to ensure greater accessibility for those who prefer print - Files are distributed to accessibility platforms such as Bookshare and RNIB Bookshare for those with print disabilities - As a Platinum OA publisher, Lever Press titles are free for everyone with internet access - "Unconstrained by legacy publishing processes and leveraging the opportunities for reuse facilitated by an open-access business model, Lever Press will welcome projects of digital scholarship not well served by scholarly conventions limited to print-only outcomes." <p>(Lever's Commitments - Born digital https://www.leverpress.org/about)</p>
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Technical & logistical feasibility & user privacy	N/A	<ul style="list-style-type: none"> - Infeasible technical set up or management. - No technical instructions available. - No user data privacy practices. - No mechanism for discoverability of content. - No accessibility statement. - No method for long-term preservation. 	<ul style="list-style-type: none"> - Technical set up or mediation by library staff and/or member institution authors may present challenges or significant labor. - Inadequate technical instructions available. - Inadequate data privacy practices. - Some discoverability of content. - Accessibility statement and long-term preservation practices do not meet Libraries' standards. 	<ul style="list-style-type: none"> - Technical set up and mediation by library staff and/or institution's authors is feasible. - Some technical management instructions available. - Clear commitment to user data privacy. - Discoverability of content through direct URL or MARC records. - Accessibility statement and long-term preservation practices adequately meet Libraries' standards. 	<ul style="list-style-type: none"> - Minimal technical set-up for library staff. - Minimal or no intervention from authors or library staff required. - Detailed and current technical management instructions available. - Clear commitment to user data privacy. - Provider facilitates text and data mining. - Discoverability of content at target level (ebook) enabled via Alma/Primo. - Accessibility statement meets or exceeds Libraries' standards. - Long-term preservation facilitated via established service (ex. Portico, LOCKSS, CLOCKSS). 	3	<ul style="list-style-type: none"> - No technical set up for library staff is required - No intervention from library staff is required; authors must prepare manuscripts, metadata, and files to meet Lever's publishing specifications as described below - Lever Press makes a detailed author guide available to help authors with manuscript preparation, completion of a metadata spreadsheet, and preparation of multimedia files to meet specifications. Lever's acquiring editor works directly with authors to ensure they understand the technical instructions and can meet the publication requirements. - Fulcrum Privacy Statement describes the policies and principles it adheres to (https://www.fulcrum.org/privacy/) - Objects are discoverable via the use of DOIs; usage and impact is core to Fulcrum's platform design. Lever Press titles are delivered to book indexers, library discovery services, and platforms including JSTOR Open, Muse Open, Open Research Library, and OAPEN. MARC records are made available for free download from the website under a CC0 license - Fulcrum, the open source publishing platform that hosts Lever's content, focuses on flexibility, durability, discoverability, accessibility, and integrity. It aims to meet the latest WCAG 2 AA Standards, uses VPAT Version 2.5 INT to report Fulcrum's compliance with WCAG 2.2, and reports content compliance via collection-specific VPATs - Fulcrum Preservation Statement describes the many facets of its approach to preservation and the methods used, which include deposit to CLOCKSS (https://www.fulcrum.org/preservation/)
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