

ORFG Annual Report

2022

CONTENTS

2

Executive Summary

3

Community of Practice

7

Funders' Voice

14

Looking Forward

15

2022 Operating Activities



This work is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/). Please attribute the [Open Research Funders Group](https://www.orfg.org/).

EXECUTIVE SUMMARY

Since our launch in 2016, the Open Research Funders Group has aimed to build a coalition of the engaged, brought together by the common belief that open scholarship is a crucial enabling strategy to achieve more equitable knowledge production and find solutions to the world's toughest problems.

Throughout 2022, we worked to build off of the two dozen core funders that now make up our membership to cultivate an even broader and richer coalition, including colleges and universities ([HELIOS](#)), professional associations and societies ([All4OS](#)), and over a hundred community members across the research ecosystem. Building and fostering this network created optimal conditions in 2022 for the ORFG to stand up a variety of new exciting initiatives, contribute to national and international efforts, and demonstrably increase the impact of our collective voice in the open scholarship space.

2022 marked an important global inflection point in open scholarship policy, with developments like the start of [implementation of the UNESCO Recommendation on Open Science](#) and new guidance from the White House Office of Science and Technology Policy (OSTP) on [Ensuring Free, Immediate, and Equitable Access to Federally Funded Research](#) that will require all federal agencies to develop plans for immediate sharing of federally funded research. The ORFG's coalition building, along with increased team capacity, meant that we were uniquely positioned to respond quickly to these developments with turnkey partners to provide feedback and help socialize and operationalize these efforts. We have a number of emerging collaborations, including with several federal agencies, and we expect these partnerships to grow and develop further in the coming months.

As we move into 2023, we are also committed to continuing to strengthen our internal community of practice, by advising our members on open scholarship policy development, discussing emerging trends and good practices, and providing opportunities through our cohorts and working groups to take deeper dives into issues like research output tracking and data sharing. Our members are the key drivers of our priorities, and we look forward to collaborating with them in the coming year to advance open practices and incentives, both across the philanthropic space and more broadly.

Membership Growth

The Open Research Funders Group continues to expand its engagement across the philanthropic community. In 2022, we added two new [members](#) - the [Dana Foundation](#) and the [Alzheimer's Disease Data Initiative](#) (ADDI). We ended the year with 24 members, as these new additions were offset by the departures of the Wellcome Trust and the James S. McDonnell Foundation. The former provided constructive feedback regarding the centrality of U.S. priorities and considerations that will undoubtedly prove helpful in engaging international funders going forward. The latter has reconfigured its mission to focus exclusively on St. Louis-area projects and is exiting the open science space. Nevertheless, the market force of the ORFG coalition is undeniable - approximately \$250 billion in combined assets, and annual grantmaking in the \$12 billion range. This presence allows us to engage with a number of funders that we anticipate will emerge as ORFG members in 2023.

24

ORFG MEMBERS

Combined assets in excess of \$250 billion, with total annual grantmaking in the \$12 billion range

Team Growth & Capacity

The ORFG team expanded in 2022, [hiring Caitlin Carter](#) in February as Project Coordinator for the Higher Education Leadership Initiative for Open Scholarship ([HELIOS](#)). Caitlin has been instrumental in growing the HELIOS network; coordinating four working groups that are now delivering tangible outputs to, for example, advance promotion and tenure reform to reward open scholarship; and stimulating cross-sector collaboration. More information on HELIOS is included in a subsequent section.

The ORFG's Community Manager (Erin McKiernan) and Open & Equitable Civic Science Fellow (Eunice Mercado Lara) continued in their positions. With the ORFG team now four members strong, and personnel dedicated to specific key communities and initiatives, this has allowed us to grow these efforts in intentional and impactful ways. Through this increased capacity, we have strengthened both our internal community of practice, as well as our external funder voice, as described throughout this report. It has also allowed us to branch out and reach new partners, for example, in the federal government and in the research output tracking space.

Policy Advances

ORFG members made a number of advances in their open scholarship policies this last year. For example, in January of 2022, both [Arcadia Fund](#) and Howard Hughes Medical Institute ([HHMI](#)) updated their policies to align with [Plan S](#), and removed their previously allowed 12-month embargo on article sharing. All articles by grantees will now need to be shared immediately at the time of online publication, which has various benefits, including accelerating the communication of research. These policies are also in accordance with [new recommendations](#) for federal agency public access policies that emerged from the White House Office of Science and Technology Policy (OSTP) in August of 2022.

The ORFG provided customized analysis and policy recommendations for several members during 2022, including Dana Foundation, Fidelity Foundation, Rita Allen Foundation, Schmidt Futures, and Templeton World Charity Foundation. This varied from analyzing language on foundation websites or requests for proposals (RFPs) within certain grant programs, to recommending specific policy clauses on code and data sharing. Several of these members indicated they would be implementing the recommended language in future RFPs, or taking these ideas for policy advancements to leadership in the near future. In the process of collecting examples and discussing these with funders, we realized that synthesizing all this information in some type of public resource would benefit not only our membership, but a much broader base of funders. This led to the development of ORFG's [Open Scholarship Policy Clause Bank](#) and [Policy Generator](#), discussed in more detail below under our external policy advising work.

In addition to the expertise described above, we have been working with the John Templeton Foundation (JTF) since September of 2022 as part of their Open Scholarship Plus Working Group. With this group, JTF has taken a unique approach to developing a foundation-wide open policy by bringing together staff across multiple areas of their organization (programs, legal, communications, etc.) from day 1 to talk through concerns and co-create the policy. The Working Group has had weekly one-hour meetings, often discussing in detail just one area of the policy such as article or data sharing, corresponding best practices, and potential issues. There is now a complete draft of the policy, which will be presented to the larger foundation for feedback in early 2023. This process continues to be hugely rewarding for the ORFG team members involved, and has given us valuable insights into the internal processes and myriad of questions that arise during policy development, which will in turn enrich our advising activities. We encourage any ORFG member interested in this type of bespoke policy development process to contact us.

Cohorts & Working Groups

As part of the [Community Manager's 2022 Listening Tour](#), several ORFG members expressed their continued interest in breaking off into cohorts and working groups to take deeper dives on specific topics of interest. With this in mind, during 2022, the ORFG continued with existing groups and launched new ones, driven by member interests.

Compliance and Output Tracking Working Group

The ORFG's Compliance and Output Tracking Working Group, which launched in 2021, continued to meet roughly monthly in the first half of 2022 to discuss shared challenges and hear about a variety of projects in this space, ranging from internal solutions used by members to external tools in development. Through regular conversations, this group honed in on specific roadblocks in the research output tracking workflow, and identified concrete steps that could be taken by key actors in the ecosystem to improve these processes. In June of 2022, we [publicly released an open letter](#), outlining these actions and calling for community feedback.

100+

COMMUNITY PARTICIPANTS

In the Research Output Tracking Community Project, including repository providers, academics, publishers, & developers

In September of 2022, we [reported publicly on the findings](#), pulling from survey responses we received and additional insights from conversations with key actors in this space. At the end of September, we launched open community calls to further expand our network and provide a more interactive environment for actors to connect and share their ideas. We held another community call in November, when the discussions began to coalesce around the importance of persistent identifiers (PIDs), and the idea emerged to stand up a working group focusing on DOIs for grants. By the end of 2022, our mailing list for these efforts had grown to 100+ community members, and we had commitments from representatives of key organizations (e.g., Crossref, DataCite, ORCID) to join our DOI working group, which will launch in early 2023.

Data Sharing Cohort

In our previous [policy landscape analysis](#), data sharing was tied with article sharing as the most prevalent practice within ORFG policy documents, with 73% of members mentioning data sharing and 55% requiring it. During the Community Manager's 2022 Listening Tour, data sharing emerged as a prominent interest area, with many members looking to develop or strengthen their policies on data. Given this, we decided to launch the ORFG's Data Sharing Cohort, with a first meeting in June and a second in September of 2022. The cohort currently has representatives from 12 ORFG member organizations and the HRA.

This group is in the process of defining its priorities and goals. Our first meeting was an opportunity for representatives to briefly share what their organizations are currently doing to promote data sharing, what they would like to see their organizations do in the future, and the challenges faced with respect to data sharing. In our second meeting, ORFG staff briefed members on a number of new federal developments in data sharing. We then facilitated a group discussion on how we might leverage these developments in our conversations with grantees or leadership, and how they might represent opportunities for the ORFG to promote data sharing or develop shared strategies. We closed 2022 by sharing with the group a collection of [highlights in data sharing](#) for the year. We will resume meetings in 2023, with a focus on identifying the potential actions this group might take collectively.

Beyond STEM Cohort

In our conversations with ORFG members, some expressed concerns that policy and research sharing discussions often focus on STEM disciplines, which does not fit their funding portfolios. With this in mind, we decided to launch a cohort for members who fund work outside of STEM research (e.g., cultural preservation, education initiatives, social justice reform). We launched this cohort in March 2022 with representatives from 6 ORFG member organizations. In our first meeting, representatives talked about the types of projects they fund, the unique challenges in these areas with respect to open scholarship (e.g., conflicts between transparency and privacy, cultural provenance, sensitivity to underserved or at-risk populations), and ideas for how the ORFG could be more intentionally inclusive of non-STEM funders. For various reasons, including bandwidth, we did not meet again during 2022. However, our intention is to reach out to interested members in 2023 and gauge interest for re-activating this cohort, or merging it with adjacent interest areas, such as community-engaged research and citizen science.

NASEM Roundtable

The ORFG serves as the operational lead for the National Academies of Sciences, Engineering, and Medicine's [Roundtable on Aligning Incentives for Open Science](#), a multiyear project bringing together senior leadership at universities, federal agencies, philanthropies, international bodies, and other organizations to rethink research evaluation and better incentivize openness. 2022 marked the beginning of a second three-year cycle for the Roundtable, with a focus on catalyzing, harmonizing, and scaling open scholarship activities. Significant progress was made in standing up durable coalitions within and across higher education, professional societies, and philanthropies (see below for more details). The Roundtable convened two member meetings in 2022, one in May (closed session) and another in [December](#) (public workshop), with the latter also featuring a cross-sector working session.

35

SENIOR LEADERS

Participating in a 12/22 Roundtable-hosted cross-sector working session, from agencies, societies, universities, funders, and more

Through the Roundtable structure, the ORFG has cultivated a robust “coalition of the engaged” to advance reward systems, infrastructure, training, and good practices in support of open scholarship. The December working session, in particular, generated a number of promising avenues for cross-sector collaboration that will be pursued in 2023. These include: (1) fleshing out, supporting, and launching an open scholarship support service prototype; (2) co-creating a “scholarly incentives in the post-Nelson era” briefing to engage leaders in incentive/credit reform discussions; (3) developing an efficient, informed, coordinated open infrastructure strategy across sectors; (4) identifying impactful ways to stimulate open scholarship activities at Minority Serving Institutions to widen the circle of engagement; and (5) collaborating with the White House to amplify and optimize the federal [Year of Open Science](#).

Higher Education Leadership Initiative for Open Scholarship

Emerging from the Roundtable, the Higher Education Leadership Initiative for Open Scholarship ([HELIOS](#)) is a cohort of colleges and universities committed to collective action to advance open scholarship within and across their campuses. HELIOS hosted its [kickoff meeting](#) in March of 2022, with an initial membership of 65 institutions. Membership quickly grew to 88 institutions and counting by the end of 2022, making HELIOS the largest, most carefully coordinated effort to align higher education practices with open scholarship values. HELIOS is co-chaired by the presidents of Arizona State University, Benedict College, and Johns Hopkins University, with Geeta Swamy, Duke's Associate Vice President for Research and Vice Dean for Scientific Integrity, serving as strategic lead. HELIOS is organized by the ORFG, with Caitlin Carter as Project Coordinator, and funding from Howard Hughes Medical Institute, John Templeton Foundation, Schmidt Futures, and Templeton World Charity Foundation.

88

COLLEGES & UNIVERSITIES

Participating in the Higher Education Leadership Initiative for Open Scholarship (HELIOS) as of December, 2022

Early on, HELIOS surveyed its members to learn about their priorities, and based on their responses, organized into four [primary working groups](#):

1. Institutional & Departmental Policy Language: focusing on [developing strategies for reforming reappointment, tenure, promotion, and hiring in support of open scholarship](#)
2. Shared Open Scholarship Infrastructure: focusing on developing a guide for institutions to [make informed decisions when it comes to buying, building, and/or sharing scholarly communications infrastructure](#)
3. Good Practices in Open Scholarship: focusing on curating existing good practice materials and partnering with the American Geophysical Union to develop [a vision for providing training and support to scholars in the geophysics discipline](#)
4. Cross-Sector Alignment: focusing on [harmonizing and aligning](#) policies, training and guidance, and infrastructure decisions across sectors like higher education, the federal government, professional societies, and private philanthropies

From April to November of 2022, HELIOS on-boarded 11 higher education leaders to spearhead the working group's efforts. Four of the leads presented at the December 2022 NASEM Roundtable sessions described above, and are working through requests to collaborate and present at upcoming meetings. Also emerging from the December sessions, HELIOS members are now collaborating with the Linguistics Society of America and the American Geophysical Union to develop and pilot open scholarship support services.

Simultaneously, [HELIOS is partnering with NASA](#) in its federal Year of Open Science efforts. Activities will include hosting meetings on HELIOS campuses; collaborating with federal agencies and allies from adjacent sectors (e.g., philanthropies, professional societies) to develop resources, tools, and language to make the practice of open scholarship easier and more rewarding; serving as a test bed for rapid, iterative, and transparent open scholarship experiments; acting as a conduit to help optimize and implement agency open science plans across the 88 HELIOS member institutions; and awarding flash grants to stimulate and reward open activities at minority-serving institutions.

HELIOS also launched its community Spotlight Series in 2022, hosting two panels to highlight cross-cutting efforts across the higher education open scholarship space. The first panel focused on institution-wide [data sharing and data retention policies](#), and the second focused on [open source, tech transfer, and commercialization](#). The visibility and impact of HELIOS grew impressively in its first months, with media coverage in [Research Information](#) and [The Scientist](#).

Alliance for Open Scholarship

In September 2022, the Open Research Funders Group recruited a diverse group of 10 professional societies and associations to launch the [Alliance for Open Scholarship](#) (All4OS). Informed by the work of the Roundtable in surfacing the key role societies play within their communities, All4OS members are collaborating to identify, articulate, and socialize appropriate open scholarship norms within their disciplines. Supported by the ORFG, All4OS works with participating organizations to tailor field-specific guidance on core considerations like supporting and sustaining open infrastructure; providing training on good open research and scholarship practices; and aligning awards and recognition schemes to promote a culture of open research and scholarship.

10

SOCIETIES & ASSOCIATIONS

Collaborating in ALL4OS to advance good practices in disciplines ranging from anthropology to microbiology

All4OS is co-chaired by senior leaders from the American Geophysical Union (AGU) and the Federation of American Societies for Experimental Biology (FASEB). In addition to participating in the Roundtable's December working session, at which a number of promising cross-sector collaborations were identified, All4OS members are initially focused on convening member-driven discussions on infrastructure, training, and incentives & culture. The group intends to consolidate the lessons shared into sample approaches and language that societies can use to develop discipline-specific guidance in these areas (read the [joint statement](#)). As detailed above, members of All4OS are collaborating with HELIOS institutions to develop open scholarship support service prototypes within their disciplines.

Philanthropic Leaders Cohort

Also organized through the Roundtable, this ad hoc group includes leaders of philanthropies committed to the idea that open scholarship is an enabling strategy to meet their organizational missions. The initial call to action was spurred by leadership from the Allen Institute, Aligning Science Across Parkinson's (ASAP), Hewlett Foundation, Howard Hughes Medical Institute (HHMI), and Moore Foundation, and organized by the ORFG. Since then, 60+ organizations – both ORFG members and beyond – have come together to discuss ways to publicly elevate open scholarship as an organizational priority, map out shared interests and possible collaborations, engage with adjacent sectors, and advance open scholarship grantmaking policies. This group had its [kick-off meeting](#) in June 2022. From conversations, two primary workstreams emerged. The first is the Open Scholarship Policy Development Working Group, a multi-unit course assisting funders in the development and implementation of open scholarship language and policies. The second is the Cross-Sector Funder Working Group, working on the formulation of funder priorities, asks, and offers to be shared with complementary sectors (higher ed, federal agencies, professional societies, etc.) as part of a concerted effort to coordinate open scholarship strategies. More details on each are provided below, and also see our [presentation](#) from the December 2022 NASEM Roundtable meeting.

60+

PHILANTHROPIC LEADERS

Engaging in NASEM Roundtable-inspired discussions to collaborate across sectors and advance open science

Open Scholarship Policy Development Working Group

Developed in collaboration with the ORFG “Stretch Goal” Working Group, the Open Scholarship Policy Development Working Group (previously the Open Access Funder Cohort Program) annually recruits a group of champions from philanthropies – both ORFG members and beyond – and empowers them to advance open policies within their organizations. This is a six-month program, providing both structured curriculum during monthly group calls and personalized advising through 1:1 sessions. The first cohort, which ended in early 2022, included the American Brain Tumor Association, Doris Duke Charitable Foundation, Esmée Fairbairn Foundation, Schmidt Futures, St. Baldrick's Foundation, and TSC (Tuberous Sclerosis Complex) Alliance. In February of 2022, we shared [curricular materials](#) developed during this first pilot, and [publicly reported](#) on lessons learned. We launched the second cohort in October of 2022 with 19 funders, including the Advanced Education Research & Development Fund, The ALS Association, American Epilepsy Society, American Federation for Aging Research, Arnold and Mabel Beckman Foundation, Burroughs Wellcome Fund, Damon Runyon Cancer Research Foundation, Dana Foundation, Focused Ultrasound Foundation, Heising-Simons Foundation, John Templeton Foundation, LUNgevity Foundation, MacArthur Foundation, Pew Charitable Trusts, Rainwater Charitable Foundation, Rita Allen Foundation, Simons Foundation, The Sontag Foundation, and the Volkswagen Foundation. This represents huge growth from our first pilot and thus large potential for advancing policy in the philanthropic space.

Cross-Sector Funder Working Group

Based on conversations with philanthropic leaders, this group formed with the following goals: (1) to engage and routinize communication and collaboration with complementary sectors, such as higher education institutions, federal agencies, and professional societies; (2) to build coalitions to develop, harmonize, and scale open scholarship incentives, good practices guidance, and infrastructure, among other priorities, and (3) to identify the best ways to operationalize “open by default”, and make open scholarship easier for researchers and organizations.

A [kick-off meeting](#) was held in September 2022, followed by a survey sent to group members in October 2022 to more systematically identify shared interests and priorities. A [second meeting](#) was held in November 2022, sharing the results of the survey and further defining asks and offers, which were subsequently presented as part of the NASEM Roundtable event in December 2022. This group will continue to meet periodically throughout 2023. Participants in this working group include senior leaders and their designates from the following organizations:

- Advanced Education Research & Development Fund
- ALS Association
- American Epilepsy Society
- American Heart Association
- Arnold and Mabel Beckman Foundation
- Bill & Melinda Gates Foundation
- Burroughs Wellcome Fund
- Doris Duke Charitable Foundation
- GO2 Foundation for Lung Cancer
- Health Research Alliance
- Heising-Simons Foundation
- Howard Hughes Medical Institute
- Michael J. Fox Foundation
- Pew Charitable Trusts
- Rainwater Charitable Foundation
- Rita Allen Foundation
- Science Philanthropy Alliance
- Simons Foundation
- Sontag Foundation
- William and Flora Hewlett Foundation

External Policy Advising

The ORFG grew its external policy advising efforts this year, with the [release of two new public resources](#) in June 2022. First, the ORFG's [Open Scholarship Policy Clause Bank](#) is designed to make policy development as easy as possible for funders. It includes sample language for policies covering a range of different scholarly outputs and sharing practices, and links to examples from ORFG members. It also includes tiered guidance, which may be especially useful for funders who would like to start with positive 'nudge' language and then strengthen their policy over time. Second, the clause bank is accompanied by a [Policy Generator](#), with questions that guide funders through the process of choosing policy characteristics that align with their goals and operations. We use these responses to build a customized policy, including decision points and examples of how other funders are approaching specific considerations, and then meet with funders to go over this proposal, making adjustments to language as necessary. This is a free service that the ORFG provides to all interested funders, not just ORFG members. For example, in September 2022, the V Foundation for Cancer Research filled out our policy generator, and we used their responses not only to provide recommendations, but advanced them to the full policy draft stage. Representatives said they plan to present this draft to leadership and are hoping to include sharing expectations in future Requests for Applications. In December 2022, we provided similar services through our policy generator for CureSearch for Children's Cancer. We are currently using these policy advising tools to guide the 19 funders in our Open Scholarship Policy Development Working Group, and expect that additional funders will fill out the Policy Generator in early 2023. Federal funders like NSF have also expressed interest in these tools, and we hope they may be useful as agencies draft their new policy plans in accordance with the August 2022 guidance from the OSTP.

National & International Impact

The ORFG also grew its external voice in 2022, providing insight and expertise on both U.S. national and international initiatives in open scholarship and adjacent areas. In April 2022, we [responded to the OSTP's 'Request for Information To Support the Development of a Federal Scientific Integrity Policy Framework'](#). In our response, we encouraged the federal government to support the development and implementation of a national-level policy on open science, require federal agencies to embed open and transparent practices into their research integrity policies, and explore ways to improve incentive structures to explicitly reward open and responsible research practices, among other recommendations, as part of a larger strategy to improve transparency and scientific integrity. In August 2022, after the OSTP released its new guidance on ['Ensuring Free, Immediate, and Equitable Access to Federally Funded Research'](#), the ORFG [expressed its public support](#), wrote briefly on the importance of [keeping equity at the forefront of OSTP's policy guidelines](#), helped to [amplify the importance](#) of this development to the broader public, and organized a briefing from the OSTP for HELIOS institutions. As mentioned above, HELIOS is also [collaborating with NASA](#) and [providing ideas](#) on how institutions can participate in the Federal Year of Open Science.

The ORFG also provided a number of consultations to the National Academies' [Strategic Council for Research Excellence, Integrity, and Trust](#), co-chaired by NASEM President Marcia McNutt. These briefings continue to shape the National Academies' overall approach to open scholarship. The ORFG has, in a similar vein, advised the Science Philanthropy Alliance, the Civic Science Network, and the Transforming Evidence Funders' Network on open scholarship and its intersection with their respective missions.

On the international front, in 2022, the ORFG had conversations with representatives from UNESCO to discuss strategies and give feedback on the guidance they were developing as part of the implementation of UNESCO's Recommendation on Open Science. In October 2022, we sent an annotated draft of the Open Science Funding Guidance they shared with us, highlighting a number of ORFG policy resources and Open & Equitable primer guidance that could be useful for UNESCO member states as they develop policies and move into the implementation stages. In December of 2022, UNESCO released their [Open Science Toolkit](#), which includes guides, factsheets, checklists and more. The ORFG's work is well represented in their toolkit, and not just in the funding guidance, but in other resources as well: (1) Their guide on [developing policies for open science](#) links to the ORFG's [Funder Policy Development Tools](#); (2) That same guide acknowledges that their checklist on 'Key elements of an open science policy' was developed in part with input and example resources from the ORFG; and (3) Their guide on [funding open science](#) lists "useful links" and the first four are the ORFG's [Open & Equitable primers](#), [incentivization blueprint](#), and [policy clause bank](#) & [policy generator](#). We are proud that the ORFG's input helped to inform UNESCO's public-facing strategy, and we hope there will be additional opportunities to work with them and possibly member states in 2023.

Also on the international front, in October 2022, the ORFG team was contacted by representatives of a group led by the Joint Research Centre of the European Commission. The group was working on a draft statement to promote the sharing of scientific methods and protocols, and were looking for feedback from funders to improve the statement and its recommendations. The ORFG's Community Manager provided some comments during an October meeting, and then sent the draft out to members, two of whom provided additional feedback. We expect the statement will be released by the Commission in 2023.

It represents a hugely promising development, and a measure of our growing impact, that national and international open scholarship initiatives are increasingly reaching out to the ORFG for this type of advising. We are eager to foster and respond to similar opportunities in 2023.

LOOKING FORWARD

Our goals for 2023 center on guiding both our internal community of practice and the coalitions we nurtured in 2022 toward increasingly tangible actions and cross-sector collaboration.

NASEM Roundtable members and HELIOS working groups will continue partnering on various projects related to open scholarship incentives, shared infrastructure, and good practices, with a focus on creating deliverables to take to academic leadership and initiatives or services that can be piloted on their campuses. The hope is that these efforts will begin to make open scholarship easier to practice and reward, while also generating concrete evidence of the benefits of open practices for both individual academics and their institutions.

The ORFG will continue its open policy advising with an eye on helping philanthropies meet their organizational missions and align their language and guidance with both federal agencies and broader international efforts. We also aim to take the lessons learned over the Open & Equitable Model Funding Program pilot to improve our guidance for funders, seeking sustainable ways to help funders embed equitable practices into their grantmaking processes over the long term. Building off this foundation, we will explore additional ways in which openness amplifies efforts to improve both philanthropy and society. This will open new vistas at the intersection of open scholarship and equity, evidence-based policymaking, civic engagement, and public confidence in science.

Finally, we will continue to grow our community efforts in the area of research output tracking, establishing working groups to tackle specific issues like DOIs for grants, which could feed back into our other initiatives as shared research outputs hopefully become easier to track and evaluate. This could help both funders and institutions better measure the impact of research sharing, and show how this sharing is achieving public good.

2022 Operating Activities*

Income

Memberships (1)	\$355,665
Program Grants (2)	\$621,459

Expenses

Personnel	\$648,497
Honoraria (3)	\$29,994
Office & General	\$19,871
Management Fees	\$120,000

Total Income (4) \$977,124

Total Expenses \$818,362

*Unaudited management report

(1) Memberships are typically paid as either grants or invoiced contributions. Income from multiyear memberships is amortized in this report.

(2) Program grants relate to specific ORFG activities and are detailed in a separate table below. Income from multiyear grants is amortized in this report.

(3) For community members contributing to the Open & Equitable Model Funding Program working group.

(4) All surplus funds carry over to future years' ORFG programming.

Funder	Amount	Notes
Arnold Ventures	\$40,000	ORFG Strategic Growth Plan; covers 12 months of a 36 month grant
Burroughs Wellcome Fund	\$55,000	Open & Equitable Model Funding Program; covers 12 months of a 24 month grant
Gordon & Betty Moore Foundation	\$55,000	Open & Equitable Model Funding Program; covers 12 months of a 24 month grant
Howard Hughes Medical Institute	\$33,333	Higher Education Leadership Initiative for Open Scholarship; covers 12 months of a 36 month award
John Templeton Foundation	\$67,737	Higher Education Leadership Initiative for Open Scholarship; covers 11 months of a 36 month grant
Rita Allen Foundation	\$125,000	Open & Equitable Model Funding Program; covers 12 months of an 18 month grant
Robert Wood Johnson Foundation	\$41,667	ORFG Strategic Growth Plan; covers 5 months of a 36 month grant
Schmidt Futures	\$55,556	Higher Education Leadership Initiative for Open Scholarship; covers 10 months of a 36 month grant
Templeton World Charity Foundation	\$76,666	ORFG Strategic Growth Plan; covers 12 months of a 36 month grant
Templeton World Charity Foundation	\$71,500	Higher Education Leadership Initiative for Open Scholarship; covers 11 months of a 36 month grant