From Here to Reality: Moving Scholarly Communication Services Out of Committee and Into Practice

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From Here to Reality: Moving Scholarly Communication Services Out of Committee and Into Practice

Description
Presentation delivered at Western Washington University Libraries' Staff Development Day, September 5, 2012.

Disciplines
Library and Information Science

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From Here to Reality:
Moving Scholarly Communication Services
Out of Committee and Into Practice

Isaac Gilman  Scholarly Communications and Research Services

WWU Libraries Staff Development Day | September 5 2012

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A Talk in Three Acts
(with an epilogue)
Act I: Philosophy
Fallacy No. 1
“New librarylike services will be offered by publishers and wholesalers, scholars will enter materials directly into libraries, libraries will perform publisherlike or bookstorelike functions.”

(Scholarly Communication: The Report of the National Enquiry, 1979)
How can we (libraries) contribute to the creation, curation, dissemination, credentialing, and promotion of original work from within our communities?
Fallacy No. 2
Shift happens...

...in instruction/reference
...in collection development
...in access services
...in systems
...in technical services
...in archives/special collections
Integrate and *mainstream*

“By “mainstreaming” scholarly communication duties into the work of all liaison librarians, the UMN Libraries are moving these issues to the very center of the profession and *fully owning* them.”

(Malenfant, 2010, p. 64)
Lack of integration...

The real trouble begins after Isaac is gone

By Stephen Flynn and Sean Burke, Special to CNN
updated 2:25 PM EDT, Tue August 28, 2012

Workers place plywood on the windows of the Royal Sonesta Hotel in New Orleans on Monday to prepare for Isaac.
Act II: Identity
Libraries are service organizations... 

...that facilitate access to information.
Scholarly Communication as Service

§ Academic libraries exist to facilitate the exchange of information and knowledge between authors/creators and readers/learners.

§ Scholarly communication is a system of exchanging information and knowledge to inform the creation of new ideas and scholarship.

∴ Scholarly communication services present an opportunity to more fully embody our identity as information providers and advocates for the free (economically and free speech-wise) exchange of ideas.
The same, but different...
Every bar has the same beer...
But what if our local beer is just as good?
What about information...?
What about information...?
Our New Identity: *Craft Brewers*

- Scholarly communication is, at its best, a peer-to-peer interaction (*home brewing*)

- Library SC services support and enable that peer-to-peer interaction (*craft brewing*)

- The emphasis is on supporting locally-produced knowledge vs. supporting global brands

We still serve Budweiser. But our own beer is on tap, too. And you can drink for free.
Forget the beer...

Scholarly communication services present an opportunity to more fully embody our identity as information providers and advocates for the free (economically and free speech-wise) exchange of ideas.

…it’s not about being open access evangelists.

…it’s not about “fighting the power” of big publishers.

…it is about providing services that better enable our students, staff, and faculty to share their ideas and knowledge with their disciplines and with the world.

Local knowledge is what makes us unique – and curating, publishing, and disseminating it is what reinforces the library’s identity and value.
Act III: Strategy
Living our identity

Build the **internal** “infrastructure”

- Build scholarly communication into mission/core goals
- Create shared understanding—and values—within the library
- Integrate scholarly communication services and responsibilities into departments/units/positions

Develop **external** connections

- Identify needs and services to meet those needs
- Seek partnerships centered on research/scholarship/creative activities
- Connect to academic curriculum
Building Internal Infrastructure
A progressive leader in the University community, the Pacific University Libraries promote inquiry, collaborative learning, and discovery through our dynamic services, our advocacy for access to knowledge, and our contributions to the creation of new knowledge. [DRAFT 2012]
CORE THEMES

• Anticipate, and respond to, our community's teaching, learning, and research needs through instruction, educational technology, and reliable delivery of relevant resources.

• Provide a physical and virtual commons to encourage dialogue that leads to discovery of new ideas, creation of collaborative partnerships, and opportunities to engage our local and global communities.

• Develop collections of resources and foster creation of original works that reflect a rich diversity of ideas, that inform the education process and that preserve the scholarly and creative achievements of our students, faculty and staff.

• Support academic freedoms and dissemination of knowledge through advocacy and outreach, and by creating policies and venues that foster ethical and sustainable publishing practices.

• Excellent service is dependent on excellent staff. PUL is committed to a workplace culture that fosters innovation among our employees by encouraging open communication, risk taking, and learning opportunities.
Shared understanding:

See *Acts I & II*. Discuss. Repeat as necessary.
Boycott!

Why are scholars boycotting publishers such as Elsevier? What would scholarly communication look like without for-profit publishing?
Checking In:
Self-Assessment

- Anonymous survey
- Rate knowledge of various scholarly communication topics/issues, e.g.:
  - Publishing models
  - Author rights
  - Copyright
  - Data management
  - Citation metrics

(See Malenfant, 2010)
Putting understanding into action

• Identify the services you want to focus on, e.g.:
  • Archiving/preserving/disseminating faculty and student work (need infrastructure and a preservation strategy)
  • Educating faculty and students about SC issues
  • Creating publishing venues (particularly for student work)

• Evaluate what role different departments/positions could play in delivering those services

• Manipulate the “zero sum” equation:
  • Are there ways to perform current tasks more efficiently or differently?
  • Are there current tasks/services for which “planned obsolescence” may be appropriate?
  • What are your missional and strategic priorities?
Case study: Librarians/Subject Specialists

• Revised position descriptions to include, e.g.:
  • “educate and inform faculty, graduate students, and campus administrators about scholarly communication issues
  • advocate for sustainable models of scholarly communication
  • work closely with faculty and students to understand their changing workflows and patterns of scholarly communication; assist in the development and creation of tools and services to facilitate scholarly communication”

• Established a performance goal on author rights

(Malenfant, 2010)
Case Study: Librarians/Subject Specialists

- Making scholarly communication a priority:
  - Approval plans were put into place to make selection more efficient
  - Staff were promoted to supervise information/reference desks and to supervise branch libraries

(Malenfant, 2010)
Everyone has a role...

- **Instruction/reference**
  - Look beyond finding/using information to how to create, publish, license, share
  - Sessions/courses on intellectual property, publishing models, etc.

- **Collection development**
  - How do selection policies change in light of boom in OA journals?
  - What does it mean to collect open access or open educational resources?
  - And, of course,serials...

- **Archives/Special Collections** (see Miner & Davis-Kahl, 2012)
  - Negotiating the connection between facilitating current communication and keeping a historical record
  - Digital preservation of new local content (!)
Everyone has a role...

- **Access services**
  - Digitizing theses/dissertations can have a (positive) impact on ILL workflow
  - E-reserves are impacted by faculty retaining rights to use their own work – or by using OA or OER items

- **Systems**
  - Management of repository platforms
  - Management of publishing platforms
  - Plug-ins for citation metrics, peer review, etc.

- **Technical services/cataloging**
  - Creating robust metadata for repository collections
  - New emphasis on getting local collections harvested
Case Study: Play to Your Strengths

- Identify how individuals can contribute – regardless of position
  - Staff member has a graduate degree in English and is a writer
  - We needed help with our publishing services
  - Started with some occasional copyediting; as efficiencies are identified in current work, involvement in publishing will grow
Developing External Connections
Needs assessment

- Examine each discipline/unit/faculty in new ways
  - *Departmental Assessment Instrument* (Fischer, 2008)
    - “Part 1: identifying disciplinary repositories, OA journals in subject, any OA mandates, listing primary societies and their journals they publish (and their copyright and self-archiving policies)”
    - “Part 2: major grant activities in the department, faculty who are publishing OA and those who deposit in a repository, tenure requirements concerning alternative publishing venues, identifying journals/books published within the department”

**Bottom line:** What are the logistics, politics, and economics of knowledge communication within that discipline?
Partnerships focused on research/scholarship

- Identify the stakeholders who have an interest in supporting research/scholarship
  - Pacific: Office of Research
  - WWU: Office of Research & Sponsored Programs

- Build a common understanding/vocabulary of the issues that matter to both parties
  - Pacific: Vice Provost for Research, Library Director, SC Librarian attended ARL/ACRL ISC together
    - Led to proposal to Academic Affairs about joint support for research/scholarly activities
Common ground...

- Tracking publications/scholarly activity of the University
  - Repository, anyone?

- Aiding in the success of grant applications
  - Think data management plans...

- Helping faculty get published/recognized for their work
  - OA author funds
  - Faculty education about journals/publishers

- Protecting faculty and University intellectual property rights
  - Author rights education
  - Time to revise the University’s IP policy…?
Connecting to academic curriculum

• Nothing is (should be) more central to the mission of the University than education

• Integrating scholarly communication into the curriculum will reinforce its importance to faculty and administration
Case Study: Library Publishing Course

• MEDA 364: Introduction to Scholarly Journal Publishing (2 credits)

Three primary goals:

• Offer a course that would complement existing course offerings related to literary magazine publishing
• Provide an introduction for students who are interested in publishing as a career or who may become authors/go to grad school
• Develop a “feeder” for student work on student journals and other scholarly publications on campus
Welcome to MEDA 364

Course Description

Scholarly publishing is a vital industry, providing a venue for sharing the results of research, study and creative activities. It is also an industry that has undergone tremendous change in the past decade, and which faces continual change as technologies and philosophies of scholarly knowledge evolve. This course will explore the process through which scholarly writing is solicited, reviewed, accepted and prepared for publication, whether in a traditional print environment or in the growing online environment. A variety of issues related to scholarly communications - including economics, peer review, open access publishing models and citation metrics - will be discussed. Students will have the opportunity to participate in mock editorial/review processes and to hear from guest speakers actively involved with scholarly journals.

Course Objectives

The primary objective of this course is to prepare students to be actively engaged - as authors, reviewers and editors - in the scholarly publication process. For students who are considering graduate work and/or further careers as academics or researchers, understanding of scholarly communications is a valuable asset. This course will provide students interested in the publishing industry with an introduction to the opportunities that exist within journal publishing.

Upon completion of this course, students should be able to:

- Understand and articulate the publication process, from initial manuscript submission to final publication.
- Identify the process/resources necessary to establish a new publication.
- Distinguish between, and describe the relative benefits of, different publishing models.
- Understand the legal relationships between author, publisher and reader in order to protect their own intellectual property rights as authors and to respect others’ rights.
- Understand the process for selecting, editing and preparing manuscripts for publication.
- Organize the review process for a scholarly publication.
- Demonstrate familiarity with an online editorial management/publishing platform.
Case Study: Library Publishing Course

- Aligns library publishing services with core University values:
  - Teaching and Learning
  - Scholarship
  - Sustainability
  - Diversity
  - Civic Engagement
Case Study: Minor in Editing/Publishing

- Collaborative project between English and Library faculty
Case Study: Embedded Publishing

- Librarians could work with academic faculty to suggest integration of publishing processes (peer review, submission to a journal, etc) into existing courses...

**ARTICLE**

Incorporating Scientific Publishing into an Undergraduate Neuroscience Course: A Case Study Using IMPULSE

Leslie Sargent Jones, Laura Allen, Kim Cronise, Natasha Juneja, Rebecca Kohn, Katherine McClellan, Ashley Miller, Azka Nazir, Andy Patel, Sarah M. Sweitzer, Erin Vickery, Anna Walton, and Robert Young

1Appalachian State University, Boone, NC 28608; 2Vanderbilt University, Nashville, TN, 37240; 3Psychology Department, Middlebury College, Middlebury, VT 05753; 4South Carolina Honors College, University of South Carolina, Columbia, SC 29208; 5Ursinus College, Collegeville, PA 19426; 6Pharmacology, Physiology and Neuroscience, University of South Carolina School of Medicine, Columbia, SC 29208.

The journal IMPULSE offers undergraduates worldwide the opportunity to publish research and serve as peer reviewers for the submissions of others. Undergraduate faculty have recognized the journal’s value in engaging students working in their labs in the publication process. However, integration of scientific publication into an with their revisions of the paper knowing that it might be published. Further, the professor found she was more thorough in critiquing students’ papers knowing they would be externally reviewed. Incorporating journal submission into the course stimulated an in depth writing experience and allowed for a deeper exploration of the topic than

The Journal of Undergraduate Neuroscience Education (JUNE), Spring 2011, 9(2):A84-A91
What Now?
Avoiding paralysis...

- Scholarly communication is in the mission
- Potential services have been identified
- Responsibilities for those services have been communicated/acknowledged
- A needs assessment of your community is underway
- You’ve reached out to external partners
- You’ve started to think about ways to integrate scholarly communication topics into the curriculum

When is it enough?
Now.

- Rome, meet Nike

- Implement pilot projects
  - Some based on assessed need, some based on projected need

- Pilots allow you to:
  - Show potential partners what is possible
  - Find out what is possible for you
More thoughts on pilots...

• Limits initial investment (vs. implementing systemic change/program)

• Easy to pull the plug

• Limited impact if it goes wrong : big upside if it goes right

• Allows you to put the “SC shift” in motion, but remain flexible/responsive to future directions

• The only way to truly learn is by doing
IF YOU BUILD IT, THEY WILL COME. (MAYBE).
Epilogue: Reality
Lessons from the Front Lines
It's easier to build services around student work

- Helps promote the quality of the education
- Helps promote student research opportunities
- Students are generally excited to have their work online
- Broad diversity of work
- Original student work avoids the publisher issues (sometimes)
Don’t wait for the perfect policy

• Policy development – esp. for repository – will be iterative

• Our dirty secret? Currently no collection management policy for repository – and I’m glad (sort of)

• Lessons learned through pilots/practice will reveal issues that can’t be anticipated

• Start with general guidelines, but be prepared to revise them
Know the ethical landscape

- Different legal/ethical issues for different collections

- Pacific: University privacy policy, HIPAA, fair use, foreign research ethics, et al...

- Be clear on your risk tolerance
Think outside the SC box...

- Non-traditional uses for the repository
- “Loss leaders” – not directly tied to SC, but reinforce service orientation and commitment to local content
- Pacific: partnership with HR
- Pacific: MFA alumni news
One word: Conferences

• Local content that disappears

• Post materials/publish proceedings

• Pacific: Host/preserve conference schedule/materials in repository

• WWU: Work with Conference Services on process to obtaining/archiving abstracts, presentations, etc?

(Checklist doesn’t seem to mention that...
http://www.acadweb.wwu.edu/eesp/conference/images/events.pdf)
Three letters: DTR

- Establish MOUs and service-level-agreements with partners
- Use SLAs with journal editors
- Establish the library’s service commitment and the partner/editor’s responsibilities
Spread the wealth...

- Sharing responsibility for projects can spread understanding of/ownership in SC mission

- *Pacific:* SC Librarian is not the one preparing OA Week display

- *Pacific:* Liaison librarians provided with repository FAQ and materials to help recruit undergrad theses
Document everything

• As with any program/service, key to sustainability and transferability

• “Formative” and “summative” documentation

• Pacific: Everything must be documented by the time I go on sabbatical...
Crib Sheet
30 minutes in 30 seconds

• Scholarly communication services are not a fad or add-on

• The academic library’s identity as an information provider is strengthened by a focus on collecting, preserving, and disseminating unique local content

• Scholarly communication services should be integrated into the mission of the library and into the responsibilities of staff across all departments

• Developing partnerships around a shared interest in promoting faculty/student research/scholarship is key

• Connecting scholarly communication services directly to academic curricula will reinforce their value to the institution

• A balance must be struck between careful planning and just jumping in


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