

Strategic and Operational Concerns of Institutional Repository Managers in Canada

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Open Ideas @ UAL Presentation

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Next for Repositories? CARL Directors Meeting
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Participants

43 IR managers

CARL and non-CARL institutions

Francophone and English institutions

Lone rangers, members of large teams,
people who wear many hats, and
everything in between

Service managers and systems librarians

Our goals

Build community/reduce isolation

Share and explore strategic and operational concerns

Establish the beginning of a framework for a research and action program for the IR community of practice in Canada for advancement of green OA

Focus group structure and methods

Rotating topic discussions: all IR managers discussed all 4 issues with a facilitator and recorder at each table.

Topics selected based on poll of ScholComm in Canada slack channel

1. Outreach
2. Service models/resourcing
3. Interoperability and enhancing discovery for repository content
4. Reducing researcher burden for populating repositories

Outreach

OA fatigue: for ScholComm librarians, for libraries, and for the population we serve. There is a lot of pressure and struggle in the OA movement that may directly impact the success of IRs that we still have to share. We need **strategies for refreshed training.**

Outreach works best as a team sport and should be the responsibility of all library staff. The ScholComm/IR manager cannot attend every OA presentation, and **the role of the liaison librarian is essential** to establish and maintain relationships. Some are still struggling to establish this connection.

Outreach

People have different motivations for using an IR. We need **targeted outreach strategies** for effective messaging to different groups content. **Strategic communications support would be helpful.**

E.g. Conference proceedings: these clients want to disseminate immediately and preserve their content. Researchers may be motivated by grant compliance.

Metrics: There is a very strong need for reliable statistics to measure impact effectively and obtain buy-in. It is **one of our most powerful recruitment tools.**

Service models/resourcing

- Despite much literature indicating self-deposit models do not result in IR growth even when there are mandates, some IRs are still trying to make the case for **mediated deposit services**?
- **IR managers are seeking natural internal service partners, and to operationalize IR services across our Libraries. Is there potential to offer supporting work/reskill existing staff where there is capacity?**
Cataloguing/metadata services are particularly important and seem a natural fit.

Service models/resourcing

- **How do we develop service models in tandem with other university operations?** Embedding the IR in existing processes makes sense. Many faculty are asking why we don't do this!

There is **substantial pressure to become an Research Information Service** (have metadata-only records for things that cannot be shared) but many feel the IR must hold the line as open archives

Interoperability/discoverability of content

Our various platforms require a lot of **customization to meet interoperability requirements**. If we are going to meet these requirements we need to be adequately resourced with **developer support**.

We are working hard to understand **how our systems/content relate to Google Scholar and how it can be surfaced there**. Google Scholar indexing is not a given.

Efficient workflows for populating the repository

Many people are looking for ways to **connect their IR with other enterprise systems** at the University, most notably RIS systems, but need **senior administrator help with establishing agreements**.

Postprints and their unavailability – **massive challenge** to populating the repository with previously published material.

Previously unpublished material

We ARE experiencing significant success in capturing, sharing and preserving materials that are previously **unpublished**.

Working papers, white papers, technical papers, technical series, methods papers, instrumentation documentation for labs, departmentally-published material

This is the area where we have very appreciative clients, we have long-term service relationships, and **we are contributing a LOT of value** in the eyes of the authors.

Rather than dismissing these as irrelevant, **it seems these non-traditional materials are a very important thing for us to examine** in thinking about the role of IRs in non-traditional scholarly communication

Threads through the topics

Changing role of liaison librarians: We would like to understand this conversation more fully. We have projects to propose for partnership, but have some trouble overcoming organizational barriers.

Resource challenges:

Technical AND service resourcing are both challenges for some of the big changes we need. The situation of the IR manager siloed in an institution, **team of 1 with no integration - that has to change.**

Open source does not mean free (or even cheap): dispose of the magical idea that free software means IT resourcing is unnecessary.

Finding OA allies among researchers

Via our IR outreach work, **we find researchers who are VERY PASSIONATE about OA**, who contribute all their work and find all their post-prints, and who take risks and agitate for change inside their scholarly communities.

We need to work harder to a) identify supporters and b) leverage this support to promote OA, and particularly green OA.

Full Report in [ERA](#):

Hatherill, J. and Vanderjagt, L. *National Institutional Repository Managers Meeting Summary Report / Réunion nationale des responsables de dépôt institutionnel Rapport sommaire*. March 2016. <https://doi.org/10.7939/R36D5PP5D>