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## ScholarWorks is a Service

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# SCHOLARWORKS IS A SERVICE (SPEAKER NOTES)

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This presentation describes how we framed our institutional repository as a service, how that approach influenced our decisions, and how this framework is evolving.

## MAKE SENSE

*“Institutional repository? Forgive me, but – that sounds vaguely obscene.” - Dorotheo Salo, Innkeeper at the Roach Motel*

When we first started ScholarWorks, we had a lot of conversations about how we were going to launch ScholarWorks and as I said, frame it. Before the site was even finished, I created a one page briefing describing ScholarWorks. There were a couple of key things that happened when I did that:

- **We declared our mission:** ScholarWorks is a **collection of services** designed to capture and showcase Boise State’s scholarship. We were very intentional from the very beginning that ScholarWorks was a service. We didn’t necessarily know what that meant beyond our five core services (hosting documents, creating researcher pages, publishing, reports, and promotion), but this required us to focus on what we could do for our university.
- The other important feature of the brief is that we **never used the words “institutional repository”** with faculty. If you remember some of the dialogue around the time Roach Motel paper came out, IRs were really struggling to figure out how to describe themselves. People knew the language that had emerged wasn’t effective, but there wasn’t really consensus. The truth is the argument of what to call them is legitimate. “Institutional repository” is confusing. Abandoning that kind of language enabled us to have conversations in ways that made sense to our faculty.

This idea of making sense extends past just things like mission statement and language. It also has to do with **how an IR fits with the campus and community that it is serving**. Boise State is a very dynamic, innovative campus whose institutional mission includes economic development for the community and state. We have to ask questions such as how does ScholarWorks support this “public, metropolitan research university” that is a part of and highly engaged in its local environment? **Do we make sense for Boise State’s mission?**

## MEDIATED DEPOSIT MODEL

Another early decision we made was to **use a mediated deposit model**. Basically, as much as possible and depending on the specifications of the project, **we do all the ingest work for the author**, including:

- Identify eligible scholarship
- Review copyright policies
- Solicit author’s permission and correct versions
- Upload documents

Although it does require us to have an infrastructure in place to efficiently manage all of these steps, a mediated deposit model has terrific benefits for both the author and us:

- Saves your faculty time and energy
- Greater quality control over the content going into the repository
- Ensure that high quality content is being ingested into the repository
- Gives us an opportunity to look holistically, at an institutional level at what research is being disseminated at Boise State.

## LOVE YOUR FACULTY

This concept came to me when we first started creating SelectedWorks sites for faculty. As with ScholarWorks collections, we also offer, and in almost all cases do, **create all SelectedWorks sites for our faculty**. Faculty send us their current CV and we start their page which includes a bio paragraph, expertise, classes, department links, and samples of their work in a couple of categories like publications, presentations, etc. I also require that every SelectedWorks site have a photo. It doesn't have to be a formal headshot, but it does have to be a reasonably appropriate photo. We also continue to maintain the sites while the faculty member is at Boise State.

Through this process we **have to keep in mind the purpose of the sites: *To showcase the individual professor***. That's really hard to do if you don't approach your work as a service, as well as appreciate the importance of their unique contributions to the university.

## USEFUL, USABLE, DESIRABLE

I've realized in recent months that a lot of what I'm talking about is **User Experience Design**. I have to admit that until our Digital Access unit started really exploring and incorporating these ideas into their work with the library's web site, I didn't pay much attention to research in this area. I was aware of web site usability, but since we don't maintain the actual ScholarWorks web site, I didn't really think about this. About the same time, the library started a space committee that really explored how the building was being used. They looked at more than just the color of the walls and the location of the furniture. Rather, they started with the students and explored what they were doing and where we could help. I loved the work that these groups were doing and it really made me step back and pay attention to the entire experience for the people we serve through ScholarWorks.

**What do they need? How are they doing their work? Do we make things easy for them? Do we make them look good? Can they trust us with their research? Will we help them get their work done?**

I don't know all the answers to these questions and sometimes the answer is "no" I'm not making things easier for them. But I believe I'm asking the right questions and I wanted to highlight this as I think it's not only important, but a great way to connect with other groups in the library that are asking similar questions.

## SCHOLARWORKS DOES NOT IGNORE DIFFERENCES IN PERSPECTIVE

Let's step back and think about **what have we been trying to accomplish with institutional repositories?**

Librarians are very functional people who like bring order and solve problems so that we can more efficiently serve our patrons. The development of institutional repositories are really just one variation of that mission.

When we have created our institutional repositories, we concentrate on things like:

- Long-term preservation
- The journal pricing crisis
- Open access mandates

I believe that **faculty have different priorities** than us and consequently tend to see the value of institutional repositories in a different light. Faculty care about:

- Tenure
- Prestige, Career Opportunities
- Academic Freedom

At the end of the day, **these faculty priorities are the motivators that drive publishing decisions** and if not considered thoughtfully, will outweigh any concerns we have as librarians. If we want to fulfill our mission to the people we are serving, we have to think about how we can reconcile these differences in perspectives and **find common ground**.

#### **SCHOLARWORKS IS NOT COLLECTION BUILDING V.1**

Building a collection is a wonderful goal and the truth is we do that all the time. But **the most successful, sustainable collections are ones that result from providing a needed service**. If you think back to traditional library collection development, we had collection development policies that defined the parameters of what we could collect. Certainly, these policies and the activities based on these policies considered the patrons we were serving. However, control of the collection and what went in it, was managed primarily by the library.

Collection development has shifted radically through the adoption of patron driven acquisition. Now patrons are not just suggesting titles, they are actually driving the purchasing of the materials the library owns and manages.

You can see the PDA collection development model applied in ScholarWorks when you look at our theses and dissertation collection. In this case, our Graduate College had several specific needs they were trying to address. They wanted to raise the profile of graduate programs, increase the accountability and quality of the students work, and simplify the review and approval process. It took us a long time, but as we worked to build this collection, we had to develop methods of solving each of these problems. What resulted is a sustainable, high quality, highly used collection of unique, original research.

What I'm finding is that **you can replicate this kind of success when you search for problems to solve instead of things to collect**.

## SCHOLARWORKS IN NOT C.Y.O.B.

*“At first glance, the idea of having few policies might seem counterintuitive. Policies provide the basis upon which we build our services...The way we prefer to approach the issue of policies is to think of them as unnecessary restrictions...Ask tough questions about each of your policies, including why it was established in the first place and if you really need it anymore.” - Aaron Schmidt and Amanda Etches, Useful, Usable, Desirable*

**ScholarWorks is not about lots of perfect policies or legal documents.** I admit this is incredibly hard for me and one that I have to challenge myself on all the time. However, we are not a repository that created some finely detailed scope statement, collection development policy, inclusion criteria, etc. We didn't detail every possible occurrence and we have actively worked to keep permission forms as simplistic as possible.

A good example of this is **how we address copyright issues.** I understand the limitations when dealing with intellectual property issues and sometimes this ideal of few policies is really hard or occasionally impossible to achieve. However, I do believe libraries have often adopted a self-protection approach to solving IP problems. Instead, I think we should consider viewing copyright and other IP issues in terms of risk assessment. All copyright management involves some risk. So **perhaps the question should not be have we eliminated all risks.** Rather, perhaps the question should be **is it worth the risk to provide the service?**

You may completely disagree with me and I understand why you would. I still think the challenge Aaron and Amanda are issuing in the final sentence of their quote is critical for us to consider. Do we need all these policies?

## SCHOLARWORKS IS GOING TO BE PART OF A RESEARCH DISSEMINATION INFRASTRUCTURE

*“Dissemination of knowledge is **as important** to the university mission as its production.” – David Shulenberg, *The University's Role in the Dissemination of Research and Scholarship – A Call to Action**

David Shulenberg, gave the closing keynote during the 2008 SPARC meeting where he talked about this idea of universities assuming responsibility for the dissemination of the research produced within their organizations. I think the idea that **dissemination is AS IMPORTANT as production is one of the most bold and intriguing ideas I heard.** Since then, I've been developing this idea of a university-wide RESEARCH DISSEMINATION INFRASTRUCTURE, which I believe will be the eventual evolution of the work we are doing with institutional repositories.

**Traditionally the dissemination of scholarship is left up to the individual professor** and in most institutions the only acceptable method of distribution is through traditionally published peer-reviewed journals. **This system is so strongly connected to the tenure review process,** it's nearly impossible to change and **there has been little impetus for faculty, or universities administrators for that matter, to investigate or change how the scholarship at their institutions is disseminated.**

I believe we can do better and I think all the work we have been doing these past several years has prepared us to **think about our entire institutions as a whole** and how the scholarship being produced there is being disseminated. I would like to see us, librarians, to take the lead on developing this idea of a research dissemination infrastructure.

## SCHOLARWORKS IS GOING TO USE A COLLABORATIVE SERVICE MODEL

As I think of this idea of a university-wide research dissemination infrastructure, I believe the service model needs to shift from just talking about service, to talking about **COLLABORATIVE SERVICE**. Although I do believe we have worked hard to understand the needs and problems of the people we are serving, **the traditional service model still holds the library as separate from these groups we are serving. What would it look like if we became research partners** and actually worked with researchers throughout the entire research lifecycle and not just during the literature review or publishing stages?

In my opinion a collaboration service model that looks like this:

- No one person has sufficient expertise to execute all the functions
- Communication and collaboration are necessary to make meaningful decisions and accomplish goals
- All team members are involved in planning and monitoring goals and procedures
- Individual team member's responsibilities vary
- Team members share joint ownership and responsibility for the project

## SCHOLARWORKS IS GOING TO BE STAFFED WITH LIBRARIANS WHO ARE RESEARCH PARTNERS

If we're going to realize this idea of a collaborative service model, we'll need people who have the ability to be successful as a research partner. When I think about being a research partner, the kinds of skills I see librarians needing include our specializations such as scholarly communications and data management. But we'll also need project management skills such as being able to work with diverse individuals and groups outside of the library and then facilitate projects involving those people.

I also think our understanding of research methodology needs to increase. This is something I've been considering for myself quite a bit. I don't have a strong enough background in research and I find myself at times not being able to contribute as much as I should. I think in the future, librarians will need a stronger background in research. I think this will also have positive benefits for our profession as a whole.

## SCHOLARWORKS IS GOING TO BE AN ADVOCATE

**We can be partners with the researchers.** We can use our skillsets and our understanding of how research is disseminated and help the information get out the door. We are already well on our way and the kinds of activities happening in our individual repositories and at a national level there is the *potential* to move the status quo to this kind of vision I'm talking about.

However, I believe to be successful in this kind of research dissemination infrastructure, **we have to become advocates**. And not only for lower journal prices and open access. Rather we have to advocate for a whole system that is *completely* successful in disseminating our university's scholarship.

So I'll leave you with the question I've been pondering for some time – **What happens if we demand that the dissemination of research is treated as important as the creation?**

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