Scholarly Communications: Planning for the Integration of Liaison Librarian Roles

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Note: Joy Kirchner was seconded from some of her other duties so that she could focus more fully on scholarly communications in the role of Project Manager for Scholarly Communications from late 2007 to March 2009.

The University of British Columbia designated Scholarly Communications as one of its major focus areas from late 2007 to spring 2009. To this end, we seconded a Project Manager and a project team to develop a formal scholarly communications project plan. The aim of the project was to develop a set of recommendations to define the Library's role in scholarly communication, to conduct formalized discussion and education of these issues with campus stakeholders, and to begin to identify recommended and sustainable service models.

The project first identified campus stakeholders, including faculty, researchers, administrators, library, and publishing constituencies and constructed a Steering Committee made up of representatives from these stakeholder groups to help guide the project. As the front line librarians to our researchers and faculty, the Steering Committee identified liaison librarians as a key stakeholder group to not only help us engage with our community as we began the process of formalized discussion and education, but also to help us and the Library to develop a picture of scholarly communications activities on our campus at the discipline level. Since the major thrust of the project was concerned with information gathering for future planning and decision making, liaison librarians' disciplinary networks could be crucial to formulating a picture of changes at the system level and in bringing that back to the Library. With such information we believed we could also better understand how liaison roles could potentially shift to meet new scholarly practices and research behaviour.

Ultimately, I felt this could potentially be another path to bring liaison librarians closer to the research and faculty research processes on our campus.

To begin the process of utilizing liaison librarians for data gathering at the discipline level and potentially shaping new roles for liaison librarians in scholarly communication, it was essential to involve them in the process early on. Their buy-in was considered critical to the success of the project in the short term and in the future operationalization of scholarly communications activities and services. The first step was to recruit several liaison librarians to work with the Steering Committee to develop a scholarly communications training program for liaison librarians that would serve two purposes:

1. To serve as a vehicle for eliciting librarian and library staff input on the shape of scholarly communications activities in the Library and in conceptualizing new roles in this arena

2. To give liaison librarians requisite tools and a coordinated approach to begin the work of engaging their faculties in a discussion of the issues

Specific objectives for liaison development included the following:

- Library staff will have an awareness of changes to the traditional model of scholarship.

- Librarians will have a base understanding of scholarly communications issues.

- Liaison Librarians will have greater confidence and expertise in their understanding of scholarly communications activities, particularly at a discipline level, and be able to educate their faculty on trends in scholarly communications; be resource people on scholarly communications issues at the discipline level; and be resource people for identifying new models of scholarship in their discipline.

As Project Manager and leader of the steering committee, my overall vision for liaison development, and indeed for the broader Scholarly Communication Project, was that our outreach programming was guided by the principle of open and shared dialogue about the issues with our community and is based on relationship-building and partnership with campus stakeholders. While we, like many research libraries, took on a leadership role in campus dialogue, we were very conscious of the necessity of gaining the acceptance and active participation of our faculty colleagues and knowledge creators on campus. In this sense, at the center of the project was our determination to engage our campus stakeholders in

a discussion. Our training with liaison librarians was developed with this understanding. From the outset, liaison librarians reported they felt comfortable with this approach and that it lent itself to a natural engagement with their faculty that could be easily integrated into their liaison practices.

Increasing Involvement With New Models of Scholarly Communication

Moving forward with the project, the Steering Committee identified several areas to bring liaison librarians into broader interaction with campus faculty. This included involvement in new models of scholarly communication, investigating new scholarship practices at the discipline level, and supporting emerging grant funding for open access mandates.

Earlier work with our Institutional Repository (IR) Project and with our journal-hosting program offered important insights into new models, which we integrated into the liaison development program. Our IR Coordinator had already had success including liaison librarians in the implementation of the IR (launched a year earlier) and in content recruitment. Her workshop on liaison roles in the success of the IR was an important element in our liaison training program. Likewise, our Digital Initiatives Librarian, who supports our faculty and editors in the development of their open access journals using OJS, was also able to share her experience engaging with faculty in the use of these new models.

In addition, we felt it was critical to involve liaison librarians in exploring other new models of scholarly publishing and communication that might be occurring elsewhere on campus. This fit our goals for engaging liaison librarians to identify and describe the scholarly communication cultures and practices in a diversity of fields at UBC. We hoped this work would allow us to examine the broader issues related to the organization and curation of UBC's scholarly output and consider how services the Library supports such as OJS[1] and the IR, could potentially advance these activities.

To build this broader picture, we asked liaison librarians to conduct an environmental scan of scholarly communications activities in their discipline using a data-gathering tool adapted from Lee Van Orsdel's *Faculty Activism in Scholarly Communications – Opportunity Assessment Instrument*.[2] We named our tool "Delving into your discipline" to emphasize the exploratory purpose of the exercise and to increase liaison librarians' ownership of the tool. In addition, seventeen UBC liaison librarians took advantage of the fortuitous

opportunity to be field librarians in ARL's study on new publications models.[3] This involved interviewing researchers on how they may be utilizing or creating new models of scholarship. These interviews allowed our liaison librarians to put into practice their recent faculty engagement training. The interview guide was also well designed for promoting the kind of faculty engagement we were encouraging: the questions were designed to invite librarians to operate from a place of curiosity in their dialogue with researchers

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Involvement in the study demonstrated to our liaison librarians that faculty engagement about new models of scholarship can be a natural progression from their usual liaison activity. Further, it afforded them the opportunity to learn more about faculty research needs and where they could potentially advance their liaison roles in scholarly communications. Many librarians observed that their faculty loved talking about their research, making this kind of engagement an easy and enjoyable experience. One liaison librarian reported, "the conversation [with the faculty member] led her to a greater understanding of the larger nature of how this faculty member conducted research and how he built up a network of contacts." Another said: "this kind of liaising effort allowed me to see firsthand how the faculty researcher communicates, networks, keeps informed and gets up-to-date information via blogs, RSS feeds, RSS feed aggregates, Wikis, YouTube, and various other online groups and mechanisms." In addition, several liaison librarians became involved with working with a faculty member to further develop their new publishing.

Developing Service Models to Facilitate Compliance with New Public Access Mandates

In response to the Canadian Institutes of Health Research (CIHR) and the US National Institutes of Health (NIH) and similar emerging mandates in Canada from the Natural Sciences and Engineering Research Council of Canada (NSERC) and Social Sciences and Humanities Research Council of Canada (SSHRC) that are expected to follow, the Project Manager constructed a working group of key medical faculty, the Director of the Office of Research Services, UBC grant fund managers, and key medical and health liaison librarians to deliberate on support for UBC researchers who must comply with these mandates. As part of the project plan, health sciences liaison librarians were

recruited to help define the library's strategy to support our faculty and researchers who receive grants with new public access mandates.

This resulted in a UBC Library / Office of Research Services collaboration to devise both short-term and long-term strategies and methods for creating linkages between the Library's institutional repository and the UBC's Office of Research Services systems. The links will enable UBC researchers to easily deposit their CIHR and NIH grant-funded publications into an open access repository within the workflow of the Research Office's grant funding management system. These cross-campus partners agreed to continue to act in an advisory capacity for these developments and future developments in a more formalized campus advisory body.

It became clear to the Working Group that ongoing education strategies are needed to inform UBC researchers of their public access compliance obligations. It was felt that the Library was best positioned to develop a consistent training template that cross-campus partners could collectively use for campus-wide education and that librarians should be involved in this process and work on this is progressing in Fall 2009.

Although this collaboration is still in its early stages, the Library is already realizing significant marketing benefits from this cross-departmental collaboration. We are getting new visibility and exposure from University Administrative offices. The Research Office and cross-departmental grant managers are promoting our work to others. Grant managers, with new awareness of the value of the Library's expertise, are actively encouraging the researchers they work with to contact our liaison librarians to help strengthen the research component of their grant application. Liaison librarians are partnering with grant managers as plans are developing to offer workshops targeted at researchers to improve grant writing. Also conversations with grant managers have led to plans to include a segment on author rights and managing copyright transfer agreements in upcoming grant writing workshops that will be taught by librarians in partnership with our Health Research Resources Office.

Other Engagement with Campus Stakeholders

While members of the project team established fruitful connection and partnership with the UBC Press and UBC editors, to date this work does not yet include liaison librarians to any great extent. However as our work with both

groups evolves, we are beginning to identify potential library roles in this arena. Many of our journal editors, for instance, are struggling with transitioning their journals to an open access model. We think there may be ways the Library can support our journal editors in this endeavor. It remains to be seen how this work may filter into liaison roles in the future.

Next Steps

The Scholarly Communications project set out to align with two Library goals:

1. To pursue new directions in order to sustain its relevance and impact in the support of academic and research needs of the University, the provincial and the larger scholarly communities in the 21st century

2. To consider ways to expand library liaison activities that brought the Library closer to the research on our campus

I believe we were successful in supporting these goals. The Steering Committee that guided the project, through a set of associated activities was able to advance the library's role in campus-wide dialogue about the system of scholarship, establish significant cross-departmental partnerships, create new and enriching models for faculty-librarian interaction and collaboration, make significant progress in both identifying the use and creation of new models of scholarship on our campus (and contributed that data to the broader ARL New Models study) and considering new roles for the Library in supporting this new arena.

Of course we still have a long way to go. While we were successful in building strong interest and enthusiasm about scholarly communications amongst most of our liaison librarians during the project term, and there was traction in our overall outreach activities leading to substantial involvement for liaison librarians, post project liaison librarian activity in this arena has dropped off. This, however, has more to do with the need to develop operational models for liaison librarian involvement in scholarly communications moving forward rather than anything else. At this point, project assessment is needed to strategize next steps. I will be conducting a post-project assessment and follow up with subject liaison librarians and others. This will help guide our next steps as we move scholarly communication activities to operational status.

Postscript: It should be noted that a number of our enterprising and innovative liaison librarians have established their own connections with faculty research outside of

the scholarly communications project. Some are involved in joint research with faculty, some have been involved in writing grant applications with faculty, and others are involved in editorial boards with faculty-produced or edited publications.

¹ OJS is open journal software developed out of the Public Knowledge Project.

² This tool was developed for the ACRL/ARL Institute for Scholarly Communications by Lee Van Orsdel and is licensed under a creative commons attribution non-commercial share alike license: www.arl.org/bm~doc/opp.pdf.

³ The study and the final report can be found at: http://www.arl.org/sc/models/model-pubs/pubstudy/index.shtml

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