The OCLC Research Library Partnership

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OCLC Research

Technical Research
Library Trends
User Research

Research Library
Partnership

WebJunction

- **Research** devoted exclusively to the challenges facing libraries and archives
- **Partnership** of research libraries collaborating on common issues
- **Lifelong learning** for library staff (WebJunction)
- All connected through a **global network** of 16,000+ member libraries
Learning and innovation

Learning and innovation have become crucial for successful library activity. As the practices and expectations of library users – as creators and users of information in their research, learning and general lives – continue to change and as the information environment continues to diversify, it becomes increasingly important for libraries to be able to respond quickly. To do this effectively, the library needs to understand directions and develop responsive services. And this in turn depends on effectively scaling learning and innovation within and across libraries.

Scaling learning

Professional development or continuing education is an important part of many groups’ activities. The group may provide some economies of provision or shared expertise, and for this reason could have been included in the later scaling capacity section.
OCLC Research
Library Partnership:
An international network to scale learning and innovation
Inform and connect

- Webinars
- Joint research & sharing
  - Working groups
  - Focus groups
  - Interest groups
- Survey participation
- Conference gatherings
- Independent events
Research support

Areas of Focus
The Evolving Scholarly Record & RDM

The Evolving Scholarly Record: Identifying patterns & trends

RLP RDM Learning Curriculum: Facilitating learning & engagement

• Realities of RDM Webinar Series
  *recordings publicly available

• RLP RDM Interest Group

The Realities of RDM: Documenting practical experiences & implications

oc.lc/esr
oc.lc/rdm
The RDM Report Series

- Report 1: Framework
  - The RDM service space
- Report 2: Scope
  - Scope of the RDM capacity in each of the 4 universities
  - Specific services in each cluster
- Report 3: Incentives
  - Institutional problem to be solved
  - Internal and external incentives
- Report 4: sourcing & scaling
  - Build or buy? Local or external?
  - Institution scale or scaled above the institution?
RDM: from Report to Action

Identifying and Acting on Incentives When Planning RDM Services

A learning guide to accompany OCLC Research publications and the 13 November 2018 Works in Progress Webinar: Identifying and Acting on Incentives When Planning RDM Services

Institutional incentives

OCLC Research has identified four general categories of incentives that influence the “decision to act” to develop institutional RDM services:

1. Compliance with mandates or policies that establish formal requirements for documenting research data management plans or for demonstrating progress toward open science goals.

2. Evolving scholarly norms that influence disciplinary perspectives on what constitutes good scientific practice, including expectations of reproducibility and transparency in documenting protocols, methods, and data sources.

3. Institutional strategies that are aided by more rigorous and systematic attention to monitoring

Constance Malpas
Research Scientist
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• companion RDM-IG + Learning Guide to further explore the issues raised in the research reports with OCLC staff and peers.

• 3-part webinar series exclusively for RLP members

View the webinar recording

Works in Progress Webinar

#OCLCAPRC18
Research support

Library Assessment

Areas of Focus
Library assessment: from gut feeling to data-supported proof

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To ensure that all patrons can enjoy efficient access to a wide array of collections and services in our diverse learning environments, I assist the University Librarian in the planning and management of resources, staff engagement as well as the collaboration with our partners on campus and beyond. Your valuable inputs and support will be our impetus for continuous improvements and innovation.
OCLC Research Library
Partnership Library
Assessment Interest Group

ESTHER WOO
DEPUTY UNIVERSITY LIBRARIAN
THE UNIVERSITY OF HONG KONG
PAST: Routine collection of statistics

Decision making, management of resources, communication with stakeholders
CHALLENGE: Measuring impact

User expectation

Value of libraries

Accountability

Non traditional services

Funding

Research output

Value of libraries
PRESENT: A bigger tool box for more complicated assessments

- Non-Participant observation
- Focus groups
- Survey
- Behavioral mapping
- V&R research
- User perceptions
- New learning spaces
- User behaviors
- Webpage
Webinar Series: Evaluating and Sharing Your Library's Impact

WebJunction and OCLC Research / 08 March 2018

Ensure your library’s programs and services are meeting patrons’ needs and exceeding expectations by using evaluation techniques that demonstrate results. This three-week webinar series on performance assessment and evaluation will help you go from gut instinct to data-supported proof.

Bringing together research and practice from across library sectors, the series will cover the ins and outs of creating assessments that provide useful, actionable data. From figuring out what information you need for an effective assessment to applying your findings, the webinars will feature experts who will teach you to evaluate your programs and services in a way that empowers you to meet the unique and evolving needs of your patrons and make the case for how your library plays a critical role in your community.

This webinar series will include opportunities for questions and discussion with the presenters and fellow participants, so join us on your own or gather your whole team. And we have provided a learner guide with activities to complete between sessions to help you get the most out of the experience.

Who should attend?

Public, academic, or research library staff who:

• have never worked with data before,
• have some experience but need a refresher, or
• would like to learn how to best leverage assessment data to benefit their library.
Webinars with assessment experts

- **User-centered Assessment: Leveraging What You Know and Filling the Gaps** (24 Apr 2018) Kara Reuter
- **Digging into Assessment Data: Tips, Tricks, and Tools of the Trade** (14 Aug 2018) Linda Hofschire
- **Take action: Using and Presenting Research Findings to Make Your Case** (3 Oct 2018) Melissa Bowles-Terry
- **Moderator / co-presenter** Lynn Connaway & Marie Radford
Interest group WebEx discussion

• Accommodate different time zones (Asia Pacific friendly + European friendly)
• Access to a wealth of resources incl. recording, slides, chat, learner guide, and related links https://www.webjunction.org/events/webjunction/presenting-research-findings.html
• Post-webinar reflection and communication
• Survey by OCLC
• OCLC Research Hanging Together blog http://hangingtogether.org/?p=6795
• SPECIAL NISO TRAINING SERIES - Assessment Practices and Metrics for the 21st Century
What, when, where, how?

KEEP CALM and formulate your RESEARCH QUESTION
Learning points and benefits

• Research question setting technique (no more gut feeling)
• Use of mixed & data driven methods (Qualitative + Qualitative – data triangulation & complementation)
• Sharing of projects and experience from individual participants/institutions
• Tailor made advice from OCLC - Assessment positions, story telling, etc.
• Building of connection internally and globally (Community of practice)

Janet Chow
Academic Services Librarian
St John’s College
Cambridge
COMING: Application and innovation

• Usability test for revamped library webpage
• Brainstorming ideas for Annual Planning Day
• Identify areas of needs in budget submission
• Facilities and services in new learning spaces – compare pre and post usage of library facilities & user behaviors
COMING: Application and innovation

• Next biennial survey
• New ILS better use of analytics
• Spread the ideas to other librarians and institutions, e.g. 2019 HKUL Leadership Institute
• Research Assessment Exercise in Hong Kong (RAE 2020)
Thank you!

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JENNIFER PETERSON
WEBJUNCTION COMMUNITY MANAGER, OCLC
Areas of Focus

Research support

Library Assessment

Special Collections & Archives
Collection building & Operational impacts

**Working Group** to produce White Paper:

- Ethical imperatives around collection management
- Practical strategies for responsible collecting
- Toolkit to assess total cost of ownership, determine overall operational impact of a potential collection
Areas of Focus

- Research support
- Library Assessment
- Metadata
- Special Collections & Archives
Changing Resource Description Workflows

Today
- Original cataloging
- Copy cataloging
- Library authority control

Tomorrow
- Entity description
- Link management
- Vocabularies from many sources
International Linked Data Surveys for Implementers

Asia-Pacific Respondents

- Australian National University
- Australian War Memorial
- Public Record Office, Victoria
- Queen’s University Library
- East China Normal University Library
- National Diet Library
- Korea National Library of Medicine
- National Library of Malaysia
- National Library Board (NLB) of Singapore
- Singapore Integrated Library Automation Services (SILAS)
Analysis of 2018 International Linked Data Survey for Implementers

OCLC Research conducted an International Linked Data Survey for Implementers in 2014 and 2015. Curious about what might have changed since the last survey, and eager to learn about new projects or services that format metadata as linked data or make subsequent uses of it, OCLC Research repeated the survey between 17 April and 25 May 2018.

A total of 143 institutions in 23 countries responded to one or more of the surveys. This analysis covers the 104 linked data projects or services described by the 81 institutions which responded to the 2018 survey—those that publish linked data, consume linked data, or both. This article provides an overview of the linked data projects or services institutions have implemented or are implementing; what data they publish and consume; the reasons given for implementing linked data and the barriers encountered; and some advice given by respondents to those considering implementing a linked data project or service. Differences with previous survey responses are noted, but as the majority of linked projects and services described are either not yet in production or implemented within the last two years, these differences may reflect new trends rather than changes in implementations.

By Karen Smith-Yoshimura
RLP Metadata Managers Focus Group

Roxanne Missingham
University Librarian (Chief Scholarly Information Services)

"I am very fortunate to be a member of the ANU Library community. Before joining the University I spent over 6 years at the Parliamentary Library providing research and information services to Members of Parliament. This was a fascinating experience - the demands for rapid analytic information were significant, with often an immediate impact of parliamentary discussions. Before that I was at the National Library, another wonderful national institution. We have a very exciting position in the ANU community supporting education, research and the University’s engagement with the community. It is great privilege to work with such a dedicated and passionate team in the library. The archives, library, E Press and repository make a great contribution to the work of ANU academics, researchers and students and increasingly provide a vital connection between the wider community, particularly policy makers and ANU researchers. The changing expectations of us and the rapid changes in our environment, including consumer technologies such as i-pads and other mobile devices and the increasing complexity of research including data"
OCLC Research Library Partnership Metadata Managers Focus Group

ROXANNE MISSINGHAM, UNIVERSITY LIBRARIAN
metadata
collections
Point
Sharing
practical
sets
vocabularies
identifiers
managers
skill
authorized
Library
management
MarcEdit
batch
viuable
data
Partnership
advocacy
digital
local
archival
value
workflows
distributed
models
reconciliation
discovery
Access
Research
New
partner
Sharing – provoking

• Representatives from 53 Partners in 10 countries
• Share information about common issues
• Identify potential new projects, working groups
• Provide feedback on data science projects
• Funnel to other communities
OCLC Research Library Partnership Metadata Managers Focus Group

The OCLC Research Library Partnership Metadata Managers Focus Group is comprised of representatives from 51 Partners in nine countries who are very interested in engaging with other OCLC Research Library Partners on issues of common concern. This focus group offers an opportunity to engage with peers in OCLC Research Library Partner institutions who are responsible for creating and managing metadata.

The focus group shares information about topics of common concern, identifies metadata management issues OCLC Research could pursue in support of the OCLC Research Library Partnership, provides feedback on OCLC Research's various metadata management projects and initiatives, and working groups as warranted.

A planning group determines three timely topics and develops question sets around these topics with context statements indicating why these questions are being asked. This information is distributed to focus group members a couple of months before each ALA conference. The compilation of the responses then serve as background for face-to-face meetings held in conjunction with ALA as well as WebEx sessions held afterwards for those who couldn't attend the meetings. Summaries of all focus group discussions are posted on the Hanging Together blog.

Discussion summaries:

2018
- [MarcEdit and other tools for batch processing and metadata reconciliation](#)
- [Are probabilistic models for vocabulary maintenance viable?](#)
- [What metadata managers expect from and value about the Research Library Partnership](#)

2017
Hang out with us!

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**Equity, Diversity, Inclusion (EDI) / Metadata**

**Creating metadata for equity, diversity, and inclusion**

November 7, 2018 - by Karin Smith-Yoshimura - Leave a Comment

That was the topic discussed recently by OCLC Research Library Partners metadata managers, initiated by Sharon Farrell of University of Alberta and Jennifer Baxmeyer of Princeton. The impetus for the ...

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**Research Data Management / Scholarly Record**

**RLP Research Data Management Interest Group: Understanding Institutional RDM Services**

November 1, 2018 - by Brian Lavoie - Leave a Comment

A few months ago, the OCLC Research Library Partnership launched a community exploration of research data management (RDM) services, featuring a three-part webinar series, an Interest Group, a set of ...

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**OCCLC Research**

Hanging Together is the blog of OCLC Research. Learn more about OCLC Research on our [website](#).

**Links**

- Lorcan Dempsey’s Weblog
- Next – OCLC Blog
- OCLC Research
- OCLC Research Library Partnership
- WebJunction

**Categories**

- Architecture and Standards (65)
- Archives and Special Collections (175)
- Digital Preservation (418)
- Digitization (22)
- e-books (4)
- Equity, Diversity, Jr.
How do we work?

- Collect ideas
- Suggest topics
- Select the top three
- Develop statements and questions
- Seek your input
- Share what we find!
The big issues

Adding Value

by Nick Youngson

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Stock Images
Archives, Libraries, Galleries

https://commons.wikimedia.org/wiki/File:111-SC-34609__NARA__55228440.jpg
The coverage of Identity management work
Exploration

• “identity management” work differs from what catalogers currently do for authority work

• Suggestions for transitioning:
  – Develop identity management as new type of authority work
  – Reorient traditional NACO authority control
  – Align library practices with that other parties, e.g., rights management agencies
How much metadata is practical?

- Much of the discussion was about receiving *not enough good* metadata from vendors
- Criteria for “good enough” metadata
- Complexities increasing
As Chela Scott Weber states in the report *Research and Learning Agenda for Archives, Special and Distinctive Collections in Research Libraries*, “For decades, A/V materials in our collections were largely either separated from related manuscript material (often shunted away to be dealt with at a later date) or treated at the item level. Both have served to create sizeable backlogs of un-quantified and un-described A/V materials.”
• Skill-sets and stakeholders across institutions are complex
• Issues by category of the AV materials
• How much effort to invest in describing AV materials just because they are unique?
• Rights management for AV materials are a “gazillion miles ahead” of other materials in terms of complexity.
APRC members are important

- use different approaches and standards, especially for archival material
- Complex languages and authorities
- share metadata with different systems
We would love to hear from you

• Ideas for discussion
• Join the Research Library Partnership and respond to the surveys
• Talk to me in the break
• Contact Karen Smith-Yoshimura
THANK YOU

Roxanne Missingham
AUSTRALIAN NATIONAL UNIVERSITY
University Librarian
Read and Use OCLC Research Reports
Share *your* practices & research

- Consider joining the Research Library Partnership!
- Share your own “Work in Progress” in a Webinar
- Write a guest blog on HangingTogether.org
Consult with us

Merrilee Proffitt

Titia van der Werf

Chela Weber

Rachel Frick

Karen Smith-Yoshimura

Dennis Massie

Rebecca Bryant

#OCLCAPRC18
THANK YOU!
APRC18 CHANGE THE GAME

THANK YOU