



SESSION 2

Case studies in successful social interoperability



HOST



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LAST SESSION'S RECAP

- Concept of “social interoperability”
- Why working in the “complex adaptive system” of the typical research university is challenging
- A model for discussing the different institutional stakeholders in research support/open science
- Started mapping out your own landscape using that model

HOUSEKEEPING NOTES

- **Only the presentation parts of this workshop are being recorded.** Participants will receive links to the videos shortly.
- **Handouts were sent to you in an e-mail and can also be found on the website**
- **Questions?** Put them in the chat box and we'll try to address them right away.
- **Mute your microphone** when not speaking
- **Enable your video**, if possible
- **Participate!**

FORMAT FOR THE DAY

- Presentation I
- Small group discussion
- Presentation II
- Small group discussion

Questions throughout the workshop!



THANKS!



Ice breaker

Go to <http://pollev.com/oclc001>

What is one word to describe how you feel right now?

Please also introduce yourself via chat



Today's plan

#1: Learn about strategies and tactics to help achieve social interoperability

#2: Explore these strategies and tactics in the context of case studies in successful cross-unit collaboration

An aerial photograph of a large, open public square or plaza. The ground is paved with light-colored tiles and features a prominent geometric pattern of dark lines forming a grid of triangles and squares. Numerous people of various ages and ethnicities are scattered across the plaza, some walking, some standing in small groups, and some pushing strollers. The overall scene depicts a busy, interconnected public space.


Achieving social interoperability: Strategies & tactics

Social interoperability

Creation and maintenance of working relationships across individuals and organizational units that promote collaboration, communication, and mutual understanding.

"Well up front, I would say I can't get anything done without partnerships. I mean it's just absolutely essential to partner, whether it's with centers, institutes, department chairs, academic deans, research deans, all the above."

Photo by Michael Roach on Unsplash



"It all takes longer and has more dependencies than you think."

Working across campus can be HARD

How do we achieve social interoperability?

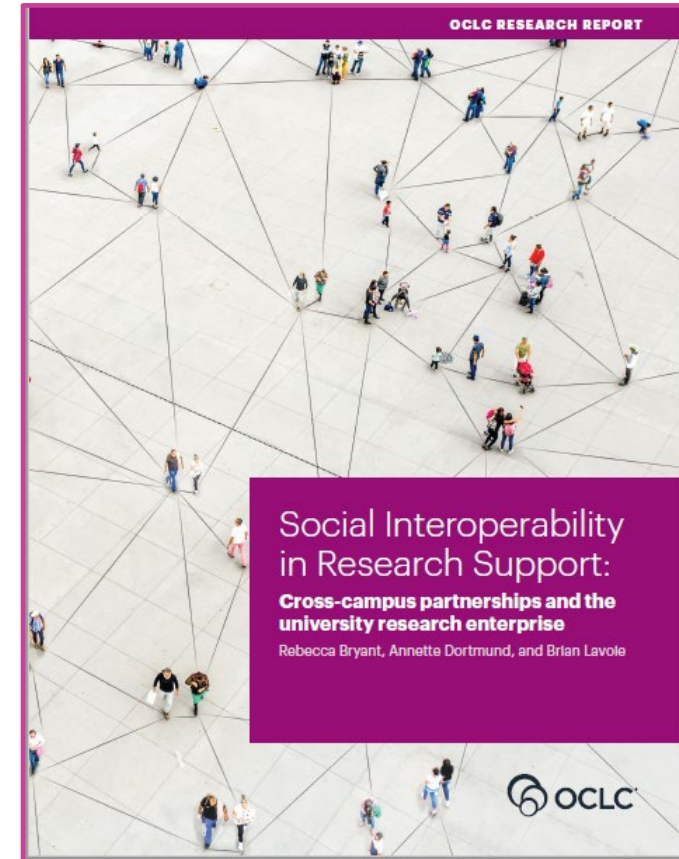
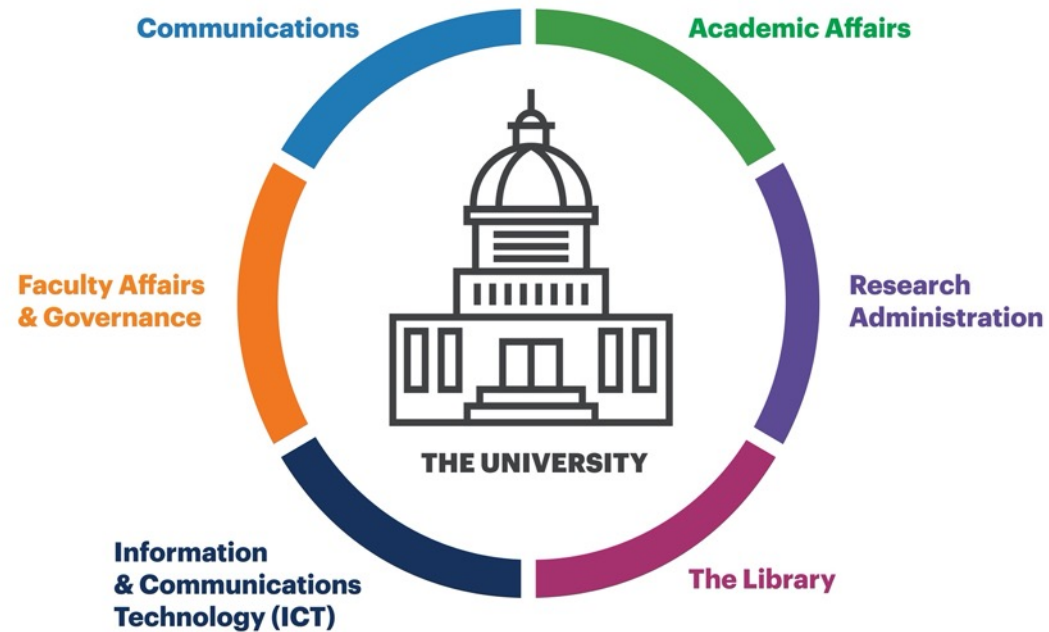
It's "people skills" ...

... utilizing a **variety of tools**



Strategies and tactics from those who use them

A Conceptual Model of Campus Research Support Stakeholders



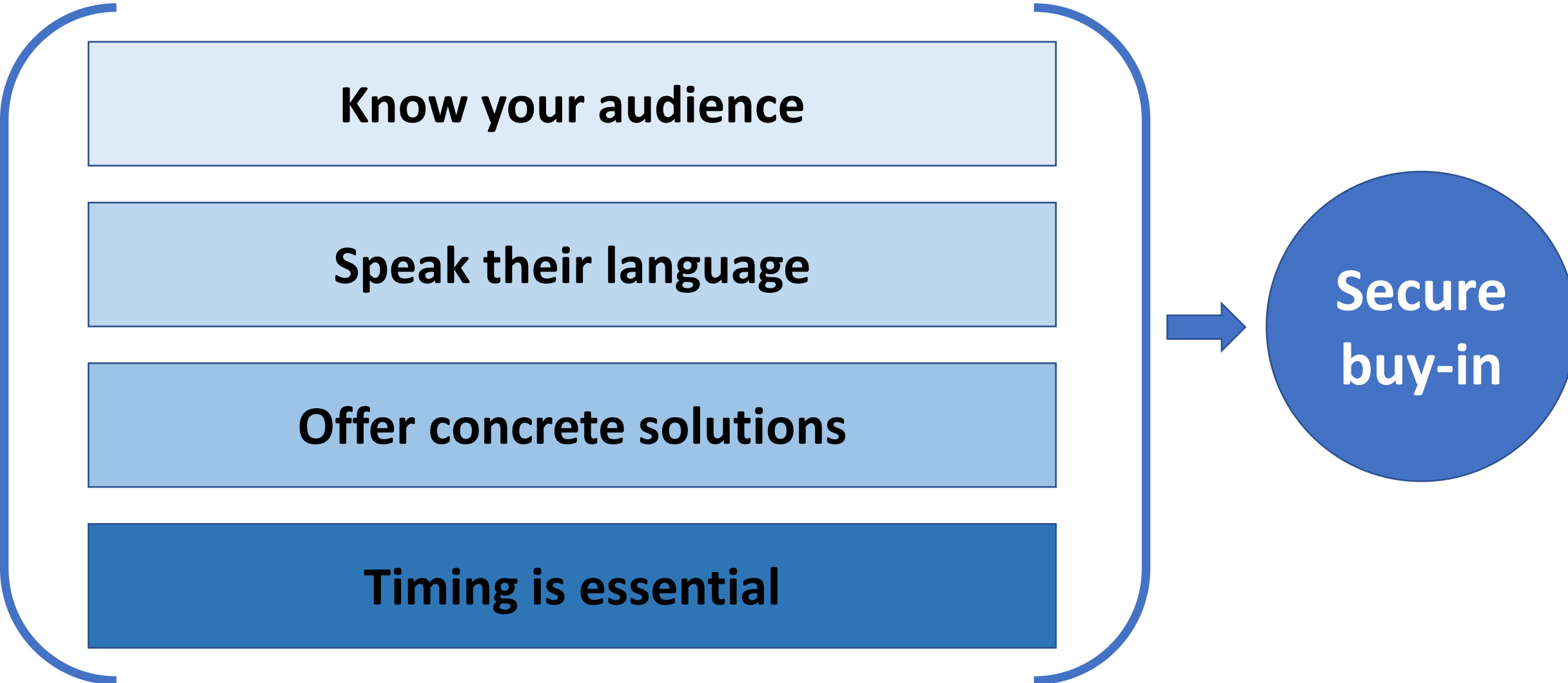
oclc.org/social-interoperability

Strategy #1: Secure buy-in

- **Collaborations work best when every partner perceives a clear benefit from participating**
- **“Top-down” mandates often do not work well**
- **Appealing to ideals and principles is good – but appealing to a prospective partner’s self-interest is better**

“So being in a decentralized institution, I have to persuade people that it’s in their best interest to do it. But if I can do that successfully, it’s much more likely to lead to [institutional] climate change than mandating.”

Secure buy-in: Tactics



Know your audience

Speak their language

Offer concrete solutions

Timing is essential

**Secure
buy-in**

Poll question

Go to <http://pollev.com/oclc001>

What concepts or terms have you found problematic in conversations with colleagues in other campus units?

Strategy #2: Build relationships

- **Successful cross-unit partnerships are built on successful cross-unit relationships between people**
- **Successful relationships require commitment & investment: both to build and maintain**



“You have that? We didn’t know you have that!”

Build relationships: Tactics

Meeting opportunities

Shared staff

Embedded staff



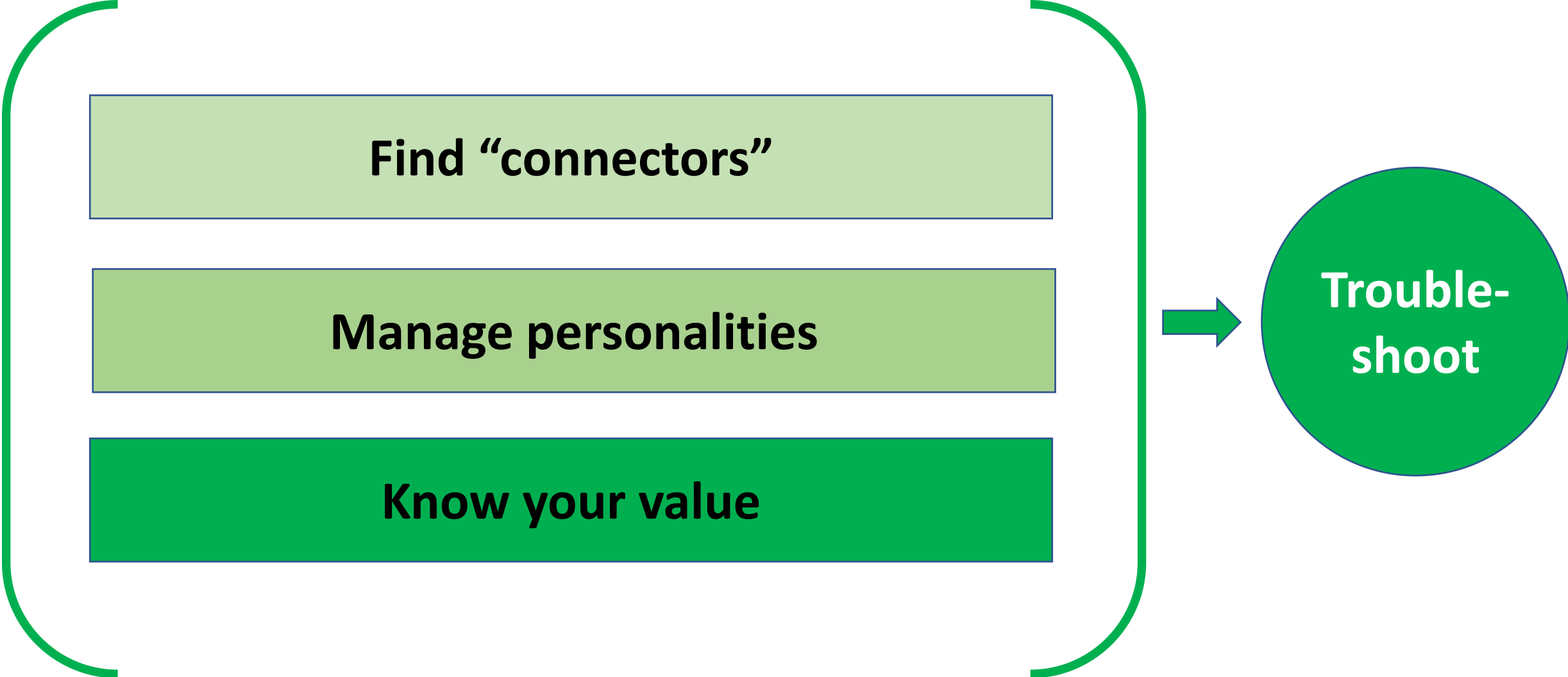
**Build
Relation
-ships**

Strategy #3: Troubleshoot

- **Social interoperability is not easy to create, because it operates in a “messy” world of real people**
- **Be prepared for obstacles, and know how to overcome them**

“It’s going to take quite a bit of effort to learn and listen about the other person’s perspectives and where they’re coming from.”

Troubleshoot: Tactics



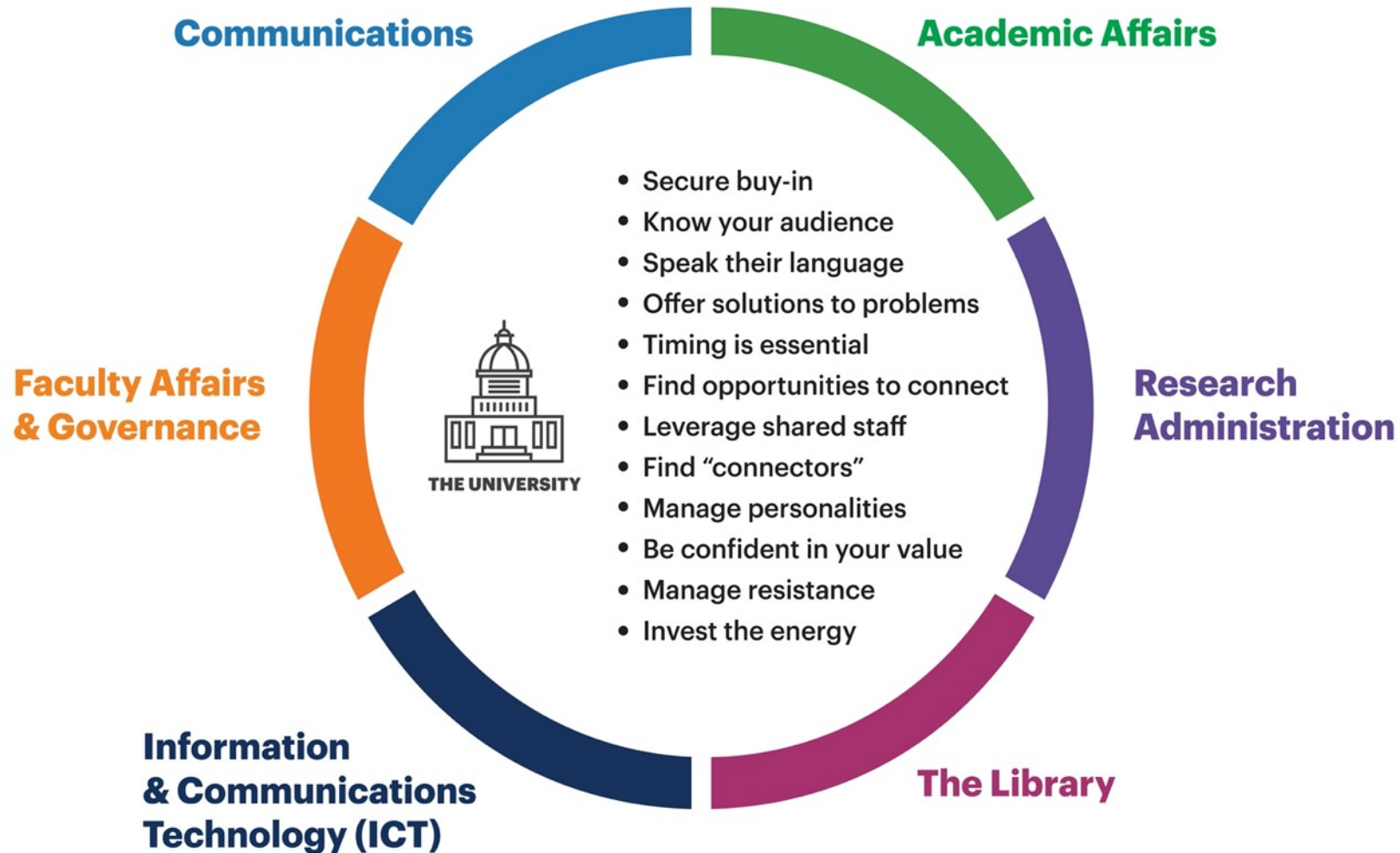
Find "connectors"

Manage personalities

Know your value

Troubleshoot

Key Takeaways about Successful Intra-campus Social Interoperability



Breakout discussion (15 minutes)

What tactics for building social interoperability have you used in your work experiences?

- Which tactics do you find most successful?
- Which tactics didn't work?
- Are there tactics you heard about today that surprised you?

An aerial photograph of a large, open plaza with a light-colored tiled floor. The floor is marked with a complex network of thin, dark lines that form a series of interconnected triangles and polygons, creating a geometric pattern. Numerous people of various ages and ethnicities are scattered throughout the plaza, some walking, some standing in small groups, and some pushing strollers. The overall scene suggests a public gathering or a busy urban space. A white rectangular box with a blue border is overlaid on the left side of the image, containing the text.

Case studies in successful cross-unit collaboration

Research support

Services that enhance researcher productivity, facilitate analysis of research activity, and/or make research outputs visible and accessible across the scholarly community and beyond.



Photo by [Scott Trento](#) on [Unsplash](#)

Photo by [Michael Beach](#) on [Unsplash](#)

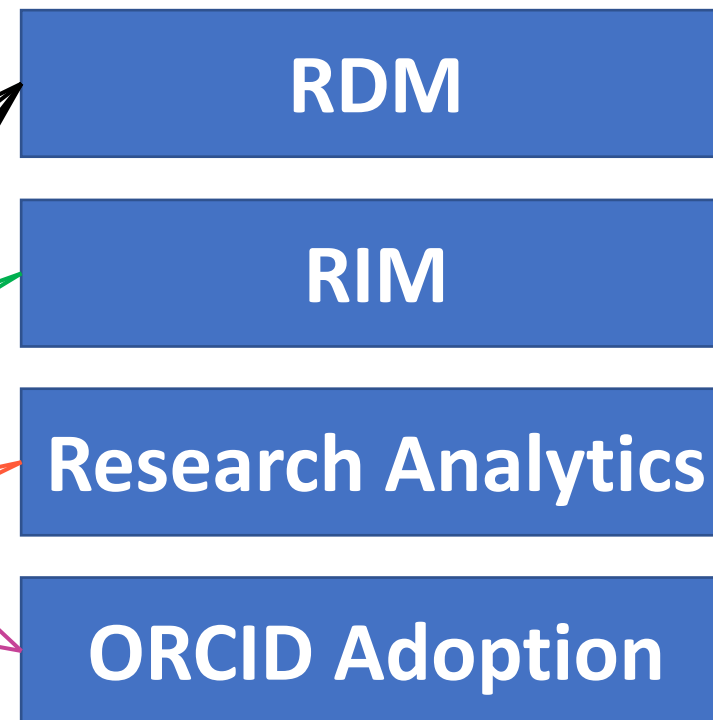
SEVEN FOCUS AREAS



Research Support & The LIBER Open Science Roadmap

Our Seven Focus Areas reflect the priorities highlighted by the Open Science Policy Platform (OSPP), in its integrated advice for the European Commission and key stakeholders. Libraries need to work across all of these areas if they want to fully support Open Science.

In the following section, we elaborate on the opportunities and challenges related to each of these areas and make specific recommendations for libraries who want to go further.



Case studies in research support

RDM



- **Wageningen University & Research (Netherlands)**
- **University of Illinois – UC (USA)**

RIM

Research Analytics



- **University of Waterloo (Canada)**

ORCID Adoption

Case study #1:

Research Data Policy at Wageningen University & Research

The Need:

Many universities developing research data policies to ensure good data management practices are observed.

At WUR, existing data policy was reviewed and deemed inadequate.

Wanted new research data policy that was more binding, and would offer guidelines for security, findability, and accessibility of data.

The Response:

Task to develop policy given to existing Data Management Support Unit (cross-unit collaborative unit).

Conducted interviews with different research groups to understand requirements & ensure policy covered diverse data practices and needs.

Guidelines linked to available infrastructure and services

Data policy developed from interview results, FAIR principles, and other frameworks

Case study #1:

Research Data Policy at Wageningen University & Research

The Response:

Task to develop policy given to cross-unit collaborative unit

Conducted interviews with different research groups to understand requirements

Guidelines linked to available infrastructure and services

Data policy developed from interview results, FAIR principles, and other frameworks

The Takeaways:

Secure buy-in:

- Know your audience
- Offer concrete solutions

Build relationships:

- Meeting opportunities

“Thanks to having involved use cases in this study, Data Management Support has an established network to engage with, which should be beneficial in the next steps of policy communication, implementation, and support.”

Case study #2:

Research data service at University of Illinois-UC

The Need:

RDM growing in importance
as responsible scientific
practice and step toward
open science

UI: strategic planning

NSF: DMP requirements

OSTP: public access

The Response:

Data Stewardship Committee formed: Library, Office of
Research, Campus IT, Graduate College, iSchool

Illinois Research Data Initiative

- Raise awareness among faculty, research staff, students, and administrators
- Provide forums for discussion of discipline-specific issues
- Understand needs and gaps for RDM infrastructure and services
- Work with units across campus to build the infrastructure and services to fill gaps and provide a base level of service

Proposal for RDS ready for new VC Research

Poll question

Go to <http://pollev.com/oclc001>

Based on the information you were given, what tactics for building social interoperability were important for making this case study successful?

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- Work with units across campus to build services

Proposal for RDS ready for new VC Research

The Takeaways:

Secure buy-in:

- Know your audience
- Offer concrete solutions
- Timing is essential

Build relationships:

- Meeting opportunities
- Shared staff

“In the time since, the Illinois RDS has made it a priority to continue to steward the strong relationships and trust established during the initial efforts with the Office of Research, campus IT, and other RDM stakeholders.”

Case study #3:

Bibliometrics & research impact (BRI) services at University of Waterloo

The Need:

University's strategic plan that emphasized a transformational research theme, which required methods for assessing progress

Increased use of bibliometrics by external agencies, such as university ranking bodies

The Response:

Provost formed cross-unit working group to develop white paper on bibliometrics (library, office of research, institutional analysis and planning, faculties, research institutes). Strong working relationships developed, particularly between library, OR, and IAPU

Review of assessment tools that university was currently licensing, and a review of existing indicator assessment activities

Crystallization of campus-wide interests in BRI in form of new position in library responsible for maintaining expertise in BRI tools and analysis, as well as working with campus stakeholders

Establishment of campus-wide BRI Community of Practice to support those around campus working in BRI

Poll question

Go to <http://pollev.com/oclc001>

Based on the information you were given, what tactics for building social interoperability were important for making this case study successful?

Case study #3:

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The Response:

Cross-unit working group to develop white paper on bibliometrics

Review of assessment tools and existing assessment activities

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The Takeaways:

Secure buy-in:

- Know your audience

Build relationships:

- Meeting opportunities
- Shared staff

Troubleshoot:

- Know your value

“It was clear to me that being connected to and known by high level administration in the Office of Research really had an impact on building partnerships in other areas such as research data management. It was a lot easier to send an email or pick up the phone and call an AVP of Research because they knew me through the working group on bibliometrics.”

Breakout discussion (15 minutes)

Think of an experience you can share that might have been helped by one or more of the social interoperability tactics we discussed.

- Which tactics would you have used?
- What problems would the tactics have helped resolve?
... scope creep, loss of control, took too long, etc.

Next steps

Blog post summary of breakout discussion highlights (anonymized)

See you at the third workshop!

“Making your plan for developing cross-functional relationships at your institution”

May 18, 2021

9:30 AM EDT, 3:30 PM CEST (90 minutes)

- 1. Building on the mapping from the first session, select a “tricky” or critical stakeholder to work with and think about how best to engage with them. What strategies and tactics might work best? Which soft skills are needed?**
- 2. Reading assignment: Review Social Interoperability in Research Support, pages 26-33, with particular attention to the sidebar “Script for learning about other units” (p. 27)**



Thank you!

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