OCLC RLP @ RLUK
On the menu

• Welcome
• Introductions
• Lorcan: Collaborating around Collection Directions
• Rachel and Merrilee: the OCLC Research European Innovation Survey
• Merrilee: unique and distinctive collections - recent work from OCLC Research
OCLC Research

Scaling and accelerating library learning and innovation.
OCLC Research Library Partnership

The OCLC Research Library Partnership provides a unique transnational collaborative network of peers to address common issues as well as the opportunity to engage directly with OCLC Research.
Lorcan Dempsey,
OCLC
@LorcanD
Collective collections/shared print
Evolution of scholarly record
RDM
Distinctive collections
Research libraries achieved status in this environment by acquiring more than their peers or by building niche collections of particular depth.

... 

Collections no longer lie at the center of research library operations and goals, even as academic communities focus ever more inclusively on knowledge and information.

Hazen. Lost in the cloud. 2011
Three trends (among others 😊)

- Inside out
- Facilitated
- Collective
Three trends

Reconfiguration of research work by network/digital environment.

Reconfiguration of the information space by network/digital environment.

Reconfiguration of library collaboration by network/digital environment.

The inside out collection

The facilitated collection

The collective collection
Reconfiguration of research work by network/digital environment.
Supporting the creative process: the emerging scholarly record
Managing personal and institutional reputation

Expertise and reputation: Identity > workflow > content
Her view is that publishers are here to make the scientific research process more effective by helping them keep up to date, find colleagues, plan experiments, and then share their results. After they have published, the processes continues with gaining a reputation, obtaining funds, finding collaborators, and even finding a new job. What can we as publishers do to address some of scientists’ pain points?

Annette Thomas, Then CEO of Macmillan Publishers

http://www.against-the-grain.com/2012/11/a-publishers-new-job/
Reconfiguration of *research work* by network/digital environment.

**Support for creation, management and disclosure of evidence, memory, community**

**Workflow is the new content**

**Reputation**
manage and disclose the intellectual outputs and expertise of the institution.

**From discovery to discoverability**

**Collective collections:**
Rightscaling and collective action
Reconfiguration of the **information space** by network/digital environment.

**Facilitated Collection**
- arXiv, SSRN, RePEc, PubMed Central (disciplinary repositories that have become important discovery hubs);

- Google Scholar, Google Books, Amazon (ubiquitous discovery and fulfillment hubs);

- Mendeley, ResearchGate (services for social discovery and scholarly reputation management);

- Goodreads, LibraryThing (social description/reading sites);

- Wikipedia, Yahoo Answers, Khan Academy (hubs for open research, reference, and teaching materials).

- FigShare, OpenRefine (data storage and manipulation tools)

- Github (software management)
Research guides & experts

Specialized guides for every research interest.
Not sure where to start? 🤖Ask Us →

Options:
- Computer science
- Chemical engineering
- Finance & investment
- Citation software
- Linguistics
- Energy
- All 131 guides

Expert profiles:
- Erja Kajosalo: Chemistry & Chemical Engineering
- Anne Graham: Civil & Environmental Engineering & More
- Courtney Crummett: Biosciences
- Tina Chan: Social Sciences

Find all 26 experts
A collections spectrum

The ‘owned’ collection
- Purchased and physically stored

The ‘facilitated’ collection
- Meet research and learning needs in best way

A print logic: the distribution of print copies to multiple local destinations

Value relates to locally assembled collection.

A network logic: a coordinated mix of local, external and collaborative services are assembled around user needs

Value relates to ability to efficiently meet a variety of research and learning needs.

http://www.xkcd.com/917/
The ‘external’ collection:
Pointing researchers at Google Scholar;
Including freely available ebooks in the catalog;
Creating resource guides for web resources.

The ‘owned’ collection
Purchased and physically stored

The ‘borrowed’ collection

The ‘shared print’ collection

The ‘shared digital’ collection

The evolving scholarly record

A collections spectrum

The ‘licensed’ collection

The ‘demand-driven’ collection

The ‘facilitated’ collection
Meet research and learning needs in best way

Note: Libraries have variable investments across the entire spectrum
Reconfiguration of the information space by network/digital environment.

The specialized collection

The facilitated collection

Specialization of locally acquired/held collections?

**Engagement**
Understand and respond to needs of faculty and students.

A diffuse responsibility for stewardship of the scholarly record

**Collective collections:** Rightscaling and collective action

Reconfiguration of the **information space** by network/digital environment.
Collective collections:

Rightscaling and collaborative action ...

Reconfiguration of library collaboration by network/digital environment.
Based on January 2011 WorldCat data

* Circles are scaled to reflect the number of print book publications in each regional collection.
Lavoie, Malpas & Shipengrover for OCLC Research. 2012.
The rise of the collective collection

System-wide organization of collections—whether the “system” is a consortium, a region, a country ....

Discoverable
Shared
Steward
Rightscaling – optimum scale?

Shared print

Research data

THE OHIO STATE UNIVERSITY
UNIVERSITY LIBRARIES

HathiTrust

BIG ACADEMIC ALLIANCE

OhioLINK

UNIVERSITY OF TORONTO

portage

Scholars Portal, Dataverse

TSpace

figshare

MENDELEY DATA

ICPSR
Collective collection
Rightscaling – optimum scale?

- The ‘borrowed’ collection
- The ‘shared print’ collection
- The ‘shared digital’ collection
- The ‘shared scholarly’ record
Reconfiguration of library collaboration by network/digital environment.

A large part of existing print collections will move into shared stewardship in next few years?

Agreements emerging around retention and sharing.

Inside out collections aggregated in network level hubs?

Or Google?

Collective collections: Rightscaling and collective action
Three trends

1. Create, manage and make discoverable evidence, community, memory.
   - The inside out collection

2. Assemble a coordinated mix of local, external and collaborative services around user needs.
   - The facilitated collection

3. Increasingly organize collections at the network or systemwide level.
   - The collective collection
Locally assembled collections. The place to go.
A history of UK shared library infrastructure in three pictures

By Chris Downer, CC BY-SA 2.0,
https://commons.wikimedia.org/w/index.php?curid=13549360
Scaling capacity
Scaling learning
Scaling innovation
Scaling influence
Libraries need to collaborate to create impact and efficiency.

Libraries need to more actively mobilise their networks of shared practice to address grand challenges as research and learning behaviors change in a network environment.

Libraries need to collaboratively advocate for user and library interests in an increasingly complicated environment.
Scoping

Who does what?

- Global
- National
- Consortial
- Local

Scaling

At what level?

- Global
- National
- Consortial
- Local

Sourcing

Where do you get the job done?

- National
- Consortial
- Market
- Institutional
What is the EMEARC survey?

- A survey of libraries at 238 research universities in the UK, the Netherlands, Germany, Austria, Switzerland, Denmark, Spain, France, and Italy
- Spearheaded by EMEA Regional Council (EMEARC)
- Gain intelligence regarding innovation trends, capacities and priorities within the European research library community.
- Scope the opportunity space for OCLC Research, and the OCLC Research Library Partnership.
Working group

- OCLC Europe, Middle East, Africa Regional Council

Annette le Roux  
Hubert Krekels  
Rupert Schaab

“Build a regional European focus to promote the research roles of OCLC”
50 survey respondents from 10 countries

Level of Work
- Directorate: 78%
- Mgmt: 20%
- Non-mgmt: 2%

Length of Time in Libraries
- Over 30 years: 34%
- 21 to 30 years: 40%
- 11 to 20 years: 18%
- Up to 10 years: 8%
Expected change in unique visitors to Library 2017-2018 (n=48)

- Physical visitors:
  - Increase by more than 20%: 8%
  - Increase by less than 20%: 52%
  - Remain the same: 9%
  - Decline by less than 20%: 2%
  - Don’t know: 3%

- Online visitors:
  - Increase by more than 20%: 20%
  - Increase by less than 20%: 69%
  - Remain the same: 7%
  - Decline by less than 20%: 2%
  - Don’t know: 3%
Reasons Faculty/Staff Use the Library Today
(n=49)

- Access online databases/journals: 67%
- Receive research support services: 61%
- Access/borrow books/materials: 47%
- Conduct research: 33%
- Use library as work space: 20%
- Request ILL: 18%
- Access/borrow journals/articles: 18%
- Get reference support from librarian: 8%
- Use library as social/meeting space: 6%
- Prepare assignments: 4%
- Use library as technology center: 2%

Expected Change in 5 years:
- Change significantly: 8%
- Change modestly: 61%
- Remain the same: 27%
- Don't know: 4%
Reasons Faculty/Staff Use the Library
Current vs. 2022
Base: Respondents who expect change (n=34)

- Access online databases/journals: Current 62%, 2022 74%
- Receive research support services: Current 53%, 2022 71%
- Access/borrow books/materials: Current 21%, 2022 53%
- Conduct research: Current 21%, 2022 26%
- Use library as workspace: Current 26%, 2022 26%
- Get reference support from librarian: Current 3%, 2022 9%
- Prepare assignments: Current 3%, 2022 6%
- Use library as a technology center: Current 3%, 2022 38%
Reasons Students Use the Library
Current vs. 2022

Base: Respondents who expect change (n=34)

- **Use library as workspace**: Current 94%, 2022 93%
- **Access/borrow books/materials**: Current 35%, 2022 73%
- **Prepare assignments**: Current 13%, 2022 30%
- **Access online databases/journals**: Current 23%, 2022 27%
- **Access/borrow journals/articles**: Current 3%, 2022 17%
- **Use library as social/meeting space**: Current 17%, 2022 35%
- **Get reference support from librarian**: Current 6%, 2022 13%
- **Use library as a technology center**: Current 7%, 2022 42%
- **Receive research support services**: Current 4%, 2022 26%
- **Conduct research**: Current 0%, 2022 3%
Priorities and Challenges

Top 3 Priorities currently

- Licensed e-collections/e-books: 41%
- Data curation/research data management: 30%
- Open access publishing: 26%

Top 3 Most Challenging/Ripe for Innovation in next 5 years

- Data curation/research data management: 59%
- Open access publishing: 31%
- Support for digital scholarship/digital humanities: 26%
Does your library … (n=45)

- …engage in innovation or efforts to develop shared capacity with other libraries or library organizations?
  - Yes: 96%
  - No: 4%
  - Don’t know: 2%

- …self-fund innovation or efforts to develop shared capacity with other libraries or library organizations?
  - Yes: 71%
  - No: 27%
  - Don’t know: 2%

- …apply for grants to support innovation or efforts to develop shared capacity with other libraries or library organizations?
  - Yes: 49%
  - No: 49%
  - Don’t know: 2%

- …have a unit that supports innovation or efforts to develop shared capacity with other libraries or library organizations?
  - Yes: 24%
  - No: 76%
  - Don’t know: 2%
INTERVIEWS WITH UK LIBRARY DIRECTORS
Interview questions

1. To what do you attribute the expected increase in use of the library?
2. What is a technology centre?
3. Increased use of the library as a social/meeting space: trend?
4. Increased support for research: how do you shift resources?
5. Servicing print collections: role of shared print?
6. Special collections: not a priority area?
7. Linked data: not a priority area?
8. Open Access: what is the current challenge?
9. Partnering in innovation: how important is international collaboration?
To what do you attribute the expected increase in use of the library?

The physical library:

“In the UK there is a strong on-campus student community”

• increased enrollment
  “Strategic decision-making in my institution is to grow student population”

• rebirth of the library as a place
  “We would not have predicted this. Libraries have reinvented themselves as study centre (...) Stacks and staff are moved to free up space”
  “The university library as an attraction: a public space for local community”
What is a technology centre?

• Converged services (IT-Library)? “That happened some time ago”

• Spaces for learning/teaching digital skills (GIS, RDM, data tools, robotics, VR, 3D-printers, etc.)?
  “We do have sites with integrated services provision, with IT and multi-media support.”
  “Not a makerspace, but playing and using technology is important in a university setting”

• Synonymous to Digital Humanities Centre?
  “We bring expertise and skills together and collaborate with the e-Research centre, Computer Sciences, Geo-spatial data services …”
Increased use of the library as a social/meeting space: trend?

- No perceived difference between social/work space
  
  “The way students work is social. To facilitate that, we are providing lots of different kinds of space to allow students to find the way that suits them best. The split social/work is too coarse.”

- Balancing between spaces for collaborative work vs reflection

- The many advantages of the library as a space:
  
  “The library is a managed space with responsible adults”
  “a home during Christmas for international students”
  “a neutral and open space for cross-disciplinary events”
Increased support for research: how do you shift resources?

• The structure of the Research Support Service is nimble, ideally
  “We have core teams and distributed subject teams”

• Internal training of staff is essential
  “There is a lot of external reskilling available nationally (DPC, DCC, etc.) but the problem is funding and travelling; releasing staff to follow those courses.”

• Identify key expertise outside the library
  “We work extremely close with the university research office.”

• Research Support is gravitating into the library, it seems
  “Research policy staff and Research computing staff moved into the library.”
Servicing print collections: role of shared print?

• Need for more nuance when speaking about print collections
  “I see a decline in lending of our general print collection and rise in borrowing from our high-demand collections and e-materials (reading lists) and use of special collections by researchers is increasing.”

• Differences between types of institutions (deposit libraries, post-92 institutions, Humanities libraries, etc.) lead to different print collection strategies.

• Nevertheless, shared print is clearly important to all of them:
  – UKRR: for monographs still a lot needs to be done;
  – Interested in national shared print and/or regional.
Special collections: not a priority area?

- Unanimous disagreement
  “special collections are more on the table than ever” (e.g. RLUK)
  “still a huge priority”

- Commitment to make special collections more easily available digitally
  “We put a lot of emphasis on it and usage grows as part of Digital Humanities, Digital Science and Born-Digital. We are sharing special collections digitally and support how scholars use digitized collections.”
Linked data: not a priority area?

• Unanimous agreement

"we are interested, but" … "it is not a high priority area" … "not at a strategic level"
Open Access: what is the current challenge?

• Complex and costly in the UK
  “OA is a major issue, in the near future also, expensive to engage with. We need solutions to make it more cost-effective to deal with. It is highly complex.”

• Discovery as part of the conversation of “WHY OA?”
  “OA as a stick works, but what is the carrot?”
  “Moving from compliance to benefit”

• The cancelling subscriptions argument
  “We are also interested in discoverability and to be able to cancel subscriptions.”
Partnering in innovation: how important is international collaboration?

• UK-centric
  – UK research libraries see themselves as inward looking and will collaborate with the usual suspects.
  – It is difficult for them to collaborate outside the library sector, unless they are partnering on something that is lead by the parent institution.

• Brexit-talks
  “What is our global positioning in the future? Which issues can benefit from global scale? These are changing times.”
A RESEARCH AND LEARNING AGENDA FOR SPECIAL COLLECTIONS AND ARCHIVES
Archives & Special Collections

• A growing priority for Research Libraries

• With the growth of shared print, increased attention to what is unique

• Positioning work for teaching, organizing for digitization, building an open collection
Community Conversation

- Chela Weber, Practitioner Researcher in Residence
- Literature review
- Active advisory group
- Iterative community conversations
- Open document review
- Publication to frame future work and dialogue
Types of Work

• In-depth Research
  – helps establish or define current status, or illuminate an ill-defined area of need, such as surveys or other intensive data gathering activities, with analysis and synthesis of that data

• Community Exploration
  – convening to examine specific issues, facilitating an ongoing discussion group to connect practitioners around evolving area of work, or gathering case studies that can point to shared issues or best practices

• Practical Advice
  – practical guidance for on-the-ground practice, highlighting current projects that employ smart tactics
Themes

- Structural and Organizational Positioning
- Equity, Diversity, Inclusion, and Accessibility
- Appraisal
- Access to Collections
- Data and Systems
Areas of Investigation

• Convergence of Special Collections and the Research Library
• Advocating for Archives and Special Collections
• Next Steps for Born Digital
• Access Needs
• Evolving Systems Environments
• Stewardship and Collection Development
• Engaging the Challenge of Diversifying Collections
Next Steps for Born Digital

- Born-digital archival collections have grown exponentially since the Taking Our Pulse survey, 2009.

- Focus on activities that come before and after the capture process, from appraisal and donor relations to reading room access.
Frameworks for Digital Responsibility

- consider what skills and roles might be needed to operationalize shared responsibility
- create networks and support systems for positions expected to be change-agents
- ongoing leadership support is required to effect programmatic change
- where RDM and Digital Archives meet
- research by Ixchel Faniel: http://hangingtogether.org/?p=5375
A proposed activity

Convene a small working group to design a “greenfield” organizational framework for supporting born-digital collections across the research library, considering issues such as labor distribution and the types of skills and knowledge needed in different roles, how special collections would interoperate with the rest of the research library, and how this might play out in small, medium, and large institutions. Identify change management considerations for enabling such a shift.
Continuing this conversation

• Used for strategic planning

• Organizing meetings and convenings

• Conversations with funders

• Staff orientation