

POST-PRINT (accepted) VERSION

Rodriguez, J. (2015) Scholarly Communications Competencies: Open Access Training for Librarians. *New Library World*. 116 (7/8), 397. doi.org/10.1108/NLW-12-2014-0140

Purpose

The purpose of this article is to describe one example of an academic library using existing internal expertise and targeted events to provide training for liaison librarians in support of new scholarly communication initiatives.

Design/methodology/approach

This article presents a case study of how a medium-size academic library without a designated scholarly communications librarian or office presented a series of open access training opportunities for the liaison librarians in preparation for the official launch of the institutional repository and the campus' inaugural participation in open access week.

Findings

The multiple opportunities to engage with the topics in diverse ways resulted in librarians being more comfortable with discussing open access with their departmental faculty. Opinions of OA were changed as a result of attending the events. Participants found the activities to be useful and were engaged enough with the topic to ask for specific areas where they would like more training opportunities. Look to other colleagues both on campus and in the broader region to tap their expertise or explore professional organizations or free webinars. Taking the initiative to organize events that require minimal effort can have a big impact.

Practical implications (if applicable)

Librarians have limited opportunity for in-depth training to gain new competencies and re-tool their skills to match current demands, this article demonstrates that utilizing internal expertise to provide a variety of training can positively impact participants attitudes and confidence.

Originality/value

This article presents methods and rationale for librarians to facilitate similar professional development opportunities for building new scholarly communication competencies in support of the emerging research and scholarly publishing trends.

Scholarly Communications Competencies: Open Access Training for Librarians

Academic librarians' responsibilities are changing to include more support across campus for scholarly communication. There are heightened expectations for librarians serving in liaison and subject specialist roles to increase their scholarly communications competencies to facilitate meaningful engagement with their department faculty on issues of scholarly publishing, author's rights, open access (OA) and to find ways to incorporate these topics into their information literacy instruction (Association of College and Research Libraries 2013; Bonn 2014).

The success of any scholarly communication outreach program depends on the involvement from all librarian liaisons and cannot rely on one designated scholarly communications member. Whether educating the campus about escalating journal subscription costs and ways to balance access or how to comply with grants and federal mandates for open access publishing and data sharing, it is vital that librarians feel confident promoting and supporting scholarly communications and OA issues with department faculty. Practicing librarians, typically, learn about emerging areas through practitioner literature and conferences but rarely is there more in-depth, hands-on training available. Each librarian does not have to be an expert but providing the means for librarians to gain new capabilities, begin to retool their skills or acquire a generalist's knowledge, will start to address the gap between current practices and know-how and the urgent demand for new competencies in support of the emerging research and scholarly publishing trends (Jaguszewski & Williams 2013).

This article is a case study of how a medium-size academic library without a designated scholarly communications librarian or office presented a series of open access training opportunities for the library faculty in preparation for the official launch of the institutional repository and the campus' inaugural participation in OA week.

Rationale

Scholarly Communications Competencies: Open Access Training for Librarians

The roles of academic library liaisons are shifting to meet the changing demands of research and scholarship on campuses. Pressure from outside academia, either from state, federal or international granting agencies and from within -- faculty senates and departments -- is increasing the need for more open and barrier-free access to research, scholarship and data access.

Scholarly communications issues and open access nationally

In 2013-2014, significant steps were taken at the federal level to guarantee greater access to research funded by the federal government. The President of the United States and the legislature directed government agencies with research budgets of one hundred million dollars or more to make electronic manuscripts of peer-reviewed journal articles freely available on the internet within twelve months of publication. This extends the open access requirements first enacted in 2005 by the National Institute of Health (NIH) to include the Department of Labor, Health and Human Services, the Centers for Disease Control (CDC), the Agency for Healthcare Research and Quality (AHRQ), and the Department of Education, among other smaller agencies (SPARC 2014 *Omnibus Appropriations*).

The push to make publically funded research available through open access has begun to filter down to the states. Illinois, for example, has passed legislation requiring state colleges and universities to establish open access policies within 12 months of the bill's enactment. The bill was later revised to require that public universities establish an open access research task force by January 1, 2014 that would act in an exploratory and advisory manner (ilga.gov 2013). In September 2014, California enacted the first state level OA policy. The *California Taxpayer Access to Publicly Funded Research Act* requires research funded by the State Department of Public Health to be made available for free to the public within 12 months of publication (SPARC 2014 *AB609*).

Scholarly communication issues and open access on university campuses

Scholarly Communications Competencies: Open Access Training for Librarians

The importance of bringing the discussion of scholarly communication topics to campus, specifically OA issues, continues to escalate whether in response to external mandates or in response to the changes taking place in the scholarly publishing industry over the last few decades. The academic community is also a driving force in this change. More and more major universities are signing *The Compact for Open-Access Publishing Equity (COPE)*. Currently, twenty-one universities have committed to developing mechanisms to financially support their faculty's OA publishing activity (Compact for Open-Access Publishing Equity n.d.). Another thirty-three universities have established OA funds compatible with the underlying principles of the COPE compact and, to date, over 240 universities and over 90 research funders worldwide have adopted open access mandates (ROAR n.d.). Libraries are increasingly the places that monitor these activities, helping their campus populations understand and comply with the mandates and providing expertise in the emerging research arena (Harris 2012; Jaguszewski & Williams 2012). All of these activities have broad consequences for researchers and scholars as well as those who support them.

Scholarly communications issues and open access in university libraries

To respond to these trends, libraries are moving toward a more “proactive model of engagement with researchers” (Auckland & Research Libraries UK 2012, p. 4). This is evidenced by recent reports that detailed the shift and expansion in librarians' roles, noting the need for updated competencies and the concern for the knowledge gap that currently exists (Association of College and Research Libraries 2013; Auckland & Research Libraries UK 2012; Jaguszewski 2013). Librarians are increasingly assisting researchers and publishing faculty with a growing list of issues: the current and expanding OA and data requirements; copyright issues; understanding different dissemination methods; research impact and more (Auckland & Research Libraries UK 2012).

The past several years issues related data support services has dominated scholarly communication agendas. As well, there is a convergence of scholarly communications with core functions of the academic library, most notably information literacy. The Association of College and Research Libraries (ACRL) white paper, *Intersection of Scholarly Communication and Information Literacy* (2013) and similarly titled book by Davis-Kahl and Hensely (2013) along with a number of other published reports (Harris 2012; Newman, Blečić & Armstrong 2007) and professional articles (Boon 2014; Malenfant 2010) all speak to the emerging area of scholarly communications support by academic libraries. Each, in some way, makes reference to the struggle practicing librarians encounter in trying to meet the changing information needs or troubles administrative personnel run into when implementing new programs; there is a knowledge gap that exists in these emerging trends. Someone needs to be “*educating* their colleagues about the changes in scholarly communication and *learning* from those same colleagues” (Bonn 2014, p 132). Where exactly this “education” will come from is not always clear, especially in circumstances with no resident subject expert in this area.

Jaguszewski and Williams (2013, p 4) promote that, “An engaged liaison seeks to enhance scholar productivity, to empower learners, and to participate in the entire lifecycle of the research, teaching and learning process.” For this to occur liaison librarians must have at their disposal the knowledge and confidence to support their departmental faculty. This study describes one example of librarians using existing internal expertise and selected training events to provide training for all liaison librarians in support of new scholarly communication initiatives.

Case study of one library

Background

Oakland University is a medium-sized public university located in southeast Michigan. There was virtually no campus discussion about open access prior to OA week 2013 events and only limited

Scholarly Communications Competencies: Open Access Training for Librarians

discussion among librarians. Some OA resources were included in the library's database list, such as Directory of Open Access Journals (DOAJ), along with one guide about OA and open education which were created in response to the 2011 eCornucopia - *Open U* conference sponsored by the campus E-learning and Instructional Support office. The *Open U* conference had included a library track and the opening presentation for this track was about open access and the rationale for institutional repositories which was presented by the Oakland University librarian who was the track coordinator. Yet, the majority of the Oakland University librarians were politely disinterested in the conference and did not attend.

During 2011-2013, a series of colliding forces provided opportunities for increased discussion about open access and engagement in related initiatives, starting with the hiring of a new highly engaged and forward thinking library Dean. Next was the recent addition of a medical school and new medical librarians, one of which was a new graduate with some knowledge of OA and plenty of enthusiasm. This was followed by the hiring of a Digital Assets Librarian who had a firm grasp of OA issues and possessed the technical abilities to resurrect the floundering development of the DSpace institutional repository.

After the arrival of the new Library Dean, the library embarked on strategic planning and as a result the two libraries (Kresge Library and the Oakland University William Beaumont Medical Library) became Oakland University Libraries, representing more cooperation between the two entities. Also, the Kresge library faculty decided to shift toward a more enhanced subject liaison model with the goal of increasing engagement with teaching faculty beyond information literacy instruction to include support for research and scholarly communication. As a result of this new direction, a new job title of Faculty Research Support librarian was created to start addressing scholarly communications support on campus.

Scholarly Communications Competencies: Open Access Training for Librarians

The first significant initiative undertaken was to host events for OA week in October 2013. A series of events were planned through collaboration with the new medical school librarian. This set into motion a sequence of activities related to open access that involved participation from other librarian colleagues. The liaison librarians would be assisting with the recruiting of the content for the resurrected institutional repository and collaborating on setting recruitment goals. The OA week events were to include the official launch to the campus of the institutional repository so, it was important that library faculty felt comfortable talking about open access, the institutional repository, and related scholarly communications issues with their departmental faculty. Further, with the enhance liaison model, librarians were starting to practice their expertise in these areas. While organizing OA week, it became clear that not all the librarians were equally informed about open access and most lacked confidence to speak about or promote OA week or the institutional repository to their departmental faculty.

The real tipping point came when, during the planning for OA week, the liaison librarians were asked not only to assist with promoting OA week to their departmental faculty but to also wear “Ask me about Open Access” buttons during the OA week events. In polling colleagues at a meeting about whether they would feel comfortable participating in this way and whether they would like some OA training beforehand, there was overwhelming interest in OA training opportunities.

Open access training for librarians

Elevator speech training

The Faculty Research Support librarian teamed up with the Digital Assets Librarian to develop a OA training workshop based off of an elevator speech training model. The training was designed to increase librarians’ knowledge of OA but also boost their confidence in talking about OA and the institutional

repository. The OA elevator pitch training workshop occurred on the Friday afternoon before OA Week with snacks and OA color appropriate orange Madri Gras beads to create a casual festive atmosphere.

The workshop started with a presentation about OA including its history, the different models (green & gold) and helpful resources. All the participants were supplied with an OA cheat sheet handout that outlined the key points and had room for notes. After the presentation, there was a brief discussion of what makes an effective elevator pitch and then participants developed their own OA elevator pitch and posted them to a Padlet wall (See live wall: <http://padlet.com/mmfinch/kjtsvez304>). The participant with the best pitch, as decided by the group, won a coffee card and all participants received an OA Guru certificate created by the presenters as a fun reward for participating. All of the resources were made available in a shared Google drive folder for the librarians to review and refer back to after the training.

Open access week

The objective of OA week was to start the campus discussion about open access issues with three events taking place during the week. The kick-off event was an introduction to OA with an *Open Access 101* brown bag which began with the Dean officially launching Oakland University's institutional repository, OUR@Oakland. This event served as an entry point for librarians as well as library staff to the basics of OA and the goals of the institutional repository. The main event for the week, the *Challenges of Traditional Publishing* panel, brought together the perspectives of a researcher and journal editor and the library's collection development librarian. The wrap-up event was an *Author's Rights and Alternatives to Copyright* brownbag which compared publishers' agreements. These events were intended to bring in an audience from across campus. All were well attended but attendance was primarily by librarians and library staff and inadvertently served as a very effective professional development opportunity for all library staff.

Webinars

Scholarly Communications Competencies: Open Access Training for Librarians

Invitations to webinars related to open access were used as a minimal effort method of providing librarians with more professional development opportunities. Email invitations were sent to all librarians for relevant activities before and after OA week. For a webinar taking place during OA week, an invitation was sent to all librarians and a room was arranged for a small group to attend together. Attendance was small at the group event and no formal assessment was done regarding individual webinar attendance. A follow-up email with a link to the recorded session was sent to all librarians after the event.

Group discussion and open access week follow-up meeting

The Friday after OA week ended, the Faculty Research Librarian lead a discussion with librarian colleagues titled: “How to talk to faculty about publishing options.” The objective was to wrap up the week’s events, get feedback from those who attended and to summarize lessons learned from several related webinars. This talk focused on looking at the entire scholarly communications cycle and opportunities where open access fits into the discussion, such as when talking to faculty about where to publish or about research and publication impact. The handouts supplied pointed to additional informational resources and links to the helpful scholarly communications related webinars.

Assessment

Follow-up assessment was done with the librarian faculty several months after OA week events took place primarily to gauge overall impression of programs and for future planning.

Elevator pitch training

Not all librarians could attend the training but a quick informal poll emailed to attendees confirmed that librarians found the activities to be valuable, some very much so. Participants were asked to rate how comfortable they were speaking about OA before and after the elevator speech training. All seven

Scholarly Communications Competencies: Open Access Training for Librarians

librarians who attended responded to the survey and for six respondents' their comfort level with speaking about OA rose dramatically. The seventh respondent's comfort level stayed the same; however, this participant rated a high comfort level before the training. (Insert Chart 1)

Open access week events

Assessment for the OA Week events was done using the same method; an informal poll was emailed to all librarians inquiring about knowledge gained from attendance at OA Week events. Those who participated in at least one event responded. Responses from nine participants revealed that they found OA Week events to be valuable in increasing their knowledge about OA. Most rated the increase by more than two points. The poll did not ask for specific feedback on each event, instead it was intended to gauge reaction to events as a whole. (Insert Chart 2)

Successes

The multiple opportunities to engage with the topics in diverse ways resulted in librarians being more comfortable with discussing OA with their departmental faculty. Comments made during discussions also indicated that opinions of OA were changed as a result of attending the events. Librarians increased their involvement in conversations about ways to take the OA discussion to faculty in the future. An unexpected result was the swift manner in which librarians submitted their research to the library scholarship collection in the institutional repository. The original goal was to have the collection developed by the end of the semester, but librarians began submitting the same day of the launch and almost all eligible articles were included within a few weeks. Finally, the topic of librarians possibly adopting an OA mandate was raised at a library meeting. Although, the discussion was very preliminary, the occurrence of such a debate demonstrated a huge leap forward toward embracing open access in a short amount of time.

Scholarly Communications Competencies: Open Access Training for Librarians

Perhaps the best measure of success was that librarians requested more training, when asked if they would like more professional development opportunities in this area six responded “YES” three said “Maybe.” Respondents were also asked to suggest topics or types of development activities they would like to see offered:

- *“Want more training on best strategies to “sell” OA to faculty – disciplines specific & promote IR”*
- *“How institutions are dealing with the “pay to play” funding model that is evolving”*
- *“Specific workshops for campus faculty to help them find out what they are allowed to do with their publications (i.e. with what they have already published).”*
- *“Any activity that keeps us abreast of what is going on would be great.”*

This feedback suggests that participants found the activities to be useful and that they are engaged enough with the topic to ask for specific areas where they would like more training opportunities.

Lessons Learned

Practicing librarians have little opportunity for in-depth training related to scholarly communication. Providing opportunities for librarians to gain new competencies, to enhance their knowledge or simply engage with topics and other professionals will enhance their confidence and buy-in for doing outreach to their departmental faculty. When planning programs, we must not forget about those closest to us, events intended to inform the campus at large are also valuable for librarians and staff colleagues. Professional development can come from many places and does not have to require a lot of effort. We can look to other colleagues both on campus and in the broader region to tap their expertise or explore professional organizations or free webinars. Taking the initiative to organize quick events that require minimal effort can have a big impact. As the proverb states, “it takes a village,” success is more achievable with everyone working for the same goal regardless of whether there is a designate position or a small group of dedicated liaison librarians all working to make an impact with a scholarly communications program.

References

- Auckland, M.; Research Libraries UK. (2012), "Re-skilling for Research: An investigation into the role and skills of subject and liaison librarians required to effectively support the evolving information needs of researchers", available at: <http://www.rluk.ac.uk/wp-content/uploads/2014/02/RLUK-Re-skilling.pdf> (accessed 15 September 2014).
- Association of College and Research Libraries. (2013), "Intersections of Scholarly Communication and Information Literacy: Creating Strategic Collaborations for a Changing Academic Environment", A Working Group on Intersections of Scholarly Communication and Information Literacy. Chicago, IL: Association of College and Research Libraries. available at: <http://acrl.ala.org/intersections> (accessed 3 November 2014).
- Bonn, M. (2014), "Tooling up: Scholarly Communication education and training" *C & RL News*, vol 75, no. 3. 132-135.
- Compact for Open-Access Publishing Equity. (n.d.), "Overview", available at: <http://www.oacompact.org/> (accessed 15 October 2014).
- Davis-Kahl, S; Hensley, M. (2013), "Common Ground at the Nexus of Information Literacy and Scholarly Communication", Association of College Research Libraries. Chicago. available at: http://www.ala.org/acrl/sites/ala.org.acrl/files/content/publications/booksanddigitalresources/digital/commonground_oa.pdf (accessed 10 September 2014).
- Harris, S. (2012), "Moving Toward an Open Access Future: the role of academic libraries", A report on a roundtable commissioned by SAGE in association with the British Library. available at: <http://www.uk.sagepub.com/repository/binaries/pdf/Library-OAReport.pdf> (accessed 21 October 2014).
- ilga.gov (2013), "Public Act 098-0295", available at: <http://www.ilga.gov/legislation/publicacts/fulltext.asp?Name=098-0295> (accessed 05, November 2014).
- Jaguszewski, J.; Williams, K. (2013), "New Roles for New Times: Transforming Liaison Roles in Research Libraries", Association of Research Libraries. Washington, D.C. available at: <http://www.arl.org/storage/documents/publications/NRNT-Liaison-Roles-final.pdf> (accessed 04 September 2014).
- National Institutes of Health. (2008), "Revised Policy on Enhancing Public Access to Archived Publications Resulting from NIH-Funded Research", available at: <http://grants.nih.gov/grants/guide/notice-files/NOT-OD-08-033.html> (accessed 28 October 2014).
- ROAR. (n.d.), "ROARMAP: Registry of Open Access Repositories Mandatory Archiving Policies", available at: <http://roarmap.eprints.org> (accessed 05 September 2014).

Scholarly Communications Competencies: Open Access Training for Librarians

SPARC. (2014), "Omnibus Appropriations Bill Codifies White House Directive", available at: <http://www.sparc.arl.org/news/omnibus-appropriations-bill-codifies-white-house-directive> (accessed 02 October 2014).

SPARC. (2014), "AB609, The California Taxpayer Access to Publicly Funded Research Act", available at: <http://www.sparc.arl.org/advocacy/state/ab609> (accessed 28 October 2014).

Malenfant, K. (2010), "Leading Change in the System of Scholarly Communication: A Case Study of Engaging Liaison Librarians for Outreach to Faculty", *College & Research Libraries*, vol 71, no 1, pp. 63-75.

Newman, K.; Blecic, D.; Armstrong, K. (2007), "SPEC Kit 299: Scholarly Communication Education Initiatives", Association of Research Libraries. Washington, DC. available at: https://www.ideals.illinois.edu/bitstream/handle/2142/2458/SPEC_Kit_299_excerpts.pdf?sequence=2 (accessed 28 October 2014).