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Using “NASIG Core Competencies for Scholarly Communication Librarians” as a Framework to Develop Campus Support and Use of a New Institutional Repository

Jennifer Pate 

Presenter

ABSTRACT

In August 2017, NASIG approved and adopted a set of core competencies that can serve as a roadmap for a new Scholarly Communication Librarian working to promote and build collections for a new campus Institutional Repository. This presentation addressed how to utilize the specific competencies to scaffold priorities when building a new repository, including developing campus partnerships with administration, colleges, departments, faculty, and students. The Core Competencies can also be used to develop effective short- and long-term goals, both for the librarian and for the Institutional Repository, and can provide communication and outreach strategies to share those goals to the campus community.

KEYWORDS

Scholarly communication;
institutional repository;
Open Access; best practices;
NASIG competencies

Background

The University of North Alabama’s Collier Library (UNA) started working to build campus support to acquire and launch an institutional repository (IR) in early 2017. The library administration created a new position for a scholarly communication librarian to promote Open Access (OA), open education resources (OER), and to support a future IR. In late July 2017, a new provost was hired at the university who was a huge catalyst for the IR. The provost worked with the library dean to find and allocate funds to purchase an IR platform and a contract was negotiated with bepress to launch UNA’s IR on the Digital Commons software. On August 1, 2017, the new librarian started working at UNA and on September 1 the IR became a reality when the actual design and build began with the bepress design team. In the month between the scholarly communication librarian’s start date and the start of the IR build, a few major events altered the thought process and planned workflow for the IR.

First, the dean of the library, who had been championing the idea of having a repository for quite some time across the university campus, left the university in late August. He had advocated with the university president, the provost, and the faculty senate to make the purchase of the IR platform happen. In addition to losing the dean, the systems librarian also announced in August that he would be leaving the university. He would continue working during the fall semester and would leave the library in early January 2018. This meant that the systems librarian would be available for the first few months of the design and build phase but would not be there when it was time to troubleshoot the repository, help develop metadata protocols, or do any Extensible Markup Language batch file loads. Two crucial players in the initial roll-out, promotion, and build of the IR for the library were leaving; one prior to the contract even going into effect and the other before the planned live launch. The new scholarly communication librarian would be the only person in the library tasked with building, loading, and promoting adoption and use of the repository for the indefinite future. To complicate matters further, this new librarian also had other job responsibilities,

including first year instruction and being a liaison to three different departments on campus, so her focus was divided between building the repository and instructional services. Also, after the systems librarian left in January, she assumed his administrative duties for the library's Springshare products and his liaison role with the Alabama Digital Preservation Network.

The final major event that happened right before the IR contract was signed was that Elsevier announced they had acquired bepress.¹ This acquisition sent shockwaves through the scholarly communications community, causing many to wonder what would happen now that a commercial enterprise, one that was already having significant public relations issues related to contracts and pricing, had now purchased one of the largest OA platforms available.^{2,3,4} At UNA, the concern was focused around not only the thought of building a brand new IR with a company in the middle of a merger, but building it in such a way that, should migration to a new platform be necessary in the next year or two depending on how the merger with Elsevier played out, it could be done quickly and easily. This potential complication meant making sure that all metadata files were structured so that they could be easily migrated to a new platform.

First steps for the repository

Since the librarian was relatively new to the fields of OA, OER, and scholarly communication, and because the two major supporters of the IR in the library were leaving, it was important to establish structure and guiding principles for the implementation of the IR before beginning work with bepress. Due to lack of any formal mentoring system in the scholarly communication community, the librarian had not yet identified people outside of the university working in the scholarly communication field that would be open to providing dialog and support in the early stages. While reviewing recent literature about OA and OER, the librarian saw that on August 11, 2017, NASIG formally approved and adopted a set of core competencies for scholarly communication librarians.⁵ The librarian had reviewed a draft of this document prior to interviewing for the job at UNA and was familiar with the ideas and concepts outlined in the Core Competencies. Now that the competencies had been formalized, she decided to use this document to help plan and prioritize how to strategically build campus support and use of the repository. By utilizing the document's tool box, which has four themes, five areas of emphasis, and six personal strengths, the librarian was able to determine where her knowledge gaps were and was able to scaffold the growth of the IR with her personal job proficiency growth.⁶

Four themes

The four themes in the Core Competencies are background knowledge, technical skills, outreach and instruction, and team building. Background knowledge encompasses everything from knowledge of the OA movement, digital preservation, metadata, copyright, and project management to creating policy and understanding legislation. Basically, one needs to know as much as possible about the scholarly communication landscape. The librarian was able to build a literature review based on this to fill in gaps in her knowledge. Whereas she had a solid background in project management and an understanding of the OA movement, she had not worked extensively with metadata protocols or shaping OA policies on campus. She needed to increase her knowledge of the basic principles of copyright and data management, and she needed to find sources that would keep her up-to-date with legislation centered on OA and OER at the state, national, and international levels.

Technical skills are focused primarily on understanding new technologies and data management practices. The librarian was going to be solely responsible for the initial build and implementation of the repository, so she knew she would have to become well versed in the bepress Digital Commons platform, but also would have to work to increase her knowledge of metadata best practices. She did this by adding multiple webinars and online learning modules to her already comprehensive

background knowledge literature review. Many of the webinars came from bepress's library, but she also participated in regular OpenCon Community Calls.⁷

Outreach and instruction was the theme the librarian needed the least amount of review in since she had been working as an instruction librarian and had an extensive background in outreach. Leveraging what she was learning via her literature review, webinars, and community calls, she was able to develop an action plan. This plan included identifying key players on campus, developing an elevator speech as well as a more in-depth presentation to give to departments across campus, and finding places on campus where the IR could be leveraged to promote programs or publications. In addition, she immediately started working on a LibGuide to promote the IR and researched both Open Access Week and Open Education Week to develop promotion ideas to use in the library and in campus publications.

The final theme is team building and the librarian knew she needed to get to know her coworkers in the library, her faculty in her liaison areas, and other librarians and researchers invested in the broader scholarly communication community to develop a solid foundation for the IR. Working with the other librarians was initially the most important element of the team because they played a crucial role in identifying people on the UNA campus who would be interested in utilizing the features of an IR. In addition, the other librarians could educate and relay information about the IR to their liaison areas during their meetings with faculty and department heads. The librarian also realized she needed to connect to others who had been doing this work for longer at other institutions in order to form her own mentoring network. This was extremely beneficial when looking for opinions and advice about ideas for the IR and developing best practices for the work to be done once the repository was ready to be populated with items.

Five areas of emphasis

The Core Competencies lists five areas that various scholarly communication librarians may be focused on if they are part of a wider division of labor. These five areas are: IR management, publishing services, copyright services, data management services, and assessment and impact metrics.⁸ At the University of North Alabama, since it is a smaller school that has just started building their OA and OER presence, all five areas are handled by the one librarian who splits her time equally between scholarly communications work and library instruction and reference work. Because these functions are consolidated into one position, it is necessary to have a comprehensive understanding of each area as well as an understanding of when certain items, for example copyright law, may fall outside of the scope and expertise of the job. It is essential to know when you can help and when you need to refer situations to campus legal counsel.

To increase her knowledge base in all of the areas, the librarian participated in beneficial learning opportunities including completing the Harvard Copyright X course during the spring of 2018, attending an ORCID [Open Researcher and Contributor ID] Roadshow, and attending a variety of conference presentations that were focused on scholarly communication issues. She also immersed herself in reviewing the Scholarly Publishing and Academic Resources Coalition (SPARC) materials, including SPARC author rights and author addendums and reviewing materials related to Creative Commons licensing.

Six personal strengths

Finally, the Core Competencies list six personal strengths a scholarly communication librarian should evince and continuously build on. These six strengths are collaboration, communication skills, enthusiasm, general knowledge, comfort with change, and being personable. These strengths allow the librarian to take the work that is being done to build competence in both the four themes and five areas of emphasis and utilize them to expand and grow both the repository and the job. For example, collaborating with the partners identified through the work done with liaison librarians, continuing communication and building enthusiasm with those partners, and being able to adapt to

rapid changes in academic publishing while maintaining a positive outlook helps to promote growth of the scholarly program on campus.

Future directions

The Scholarly Repository at UNA was launched in February 2018, and due to the foundation provided by the Core Competencies it has grown at a steady pace. It includes at this writing two graduate student journals, one OA academic journal, faculty publications and presentations, undergraduate research, theses, and archival materials. The short-term goal for the repository is to have over 1,000 unique items available by the end of 2018. To achieve this goal, the librarian continues to rely on the Core Competencies to help strategically plan sustainable goals and growth. She is currently collaborating with the English Department to populate the IR with back issues of their student literary journal, utilizing an intern from their department. Future presentations are planned on campus, including one to the Council of Academic Deans, the College of Art and Sciences, and the Department of Health, Physical Education, and Recreation. Campus-wide outreach is planned to target new faculty, UNA's new office of undergraduate research, and various graduate programs across campus.

The librarian plans to focus on building OER awareness and adoption over the course of the next year and has partnered on a grant with faculty from the College of Education to research and adapt course learning materials for a core curriculum course. In addition, she is working with the director of Educational Technology Services, the library cataloger, and the interim university librarian to develop a strategic plan for OER at UNA using the repository for future published materials.

Notes

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