SHERPA Roadshow
- 6 -
University of East Anglia,
March 2007

http://www.sherpa.ac.uk/

This Afternoon

- The global OA movement
- SHERPA Partnership Experiences
- Challenges & possible solutions
- Services & support for repositories
- The local picture
- Advocacy guidance and advice
- Time for questions at end of each talk

The SHERPA Partnership's 7½ Pillars of Advocacy

University of East Anglia, March 2007

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Before You Begin

- To embed & enable your repository successfully
  - Cultural change must be achieved
  - Funding, staffing, ethos and policies must be agreed
- One of the most effective tools is an advocacy campaign
  - Getting the right message to the right people
  - Tone and content varied by target audience
  - A core message & ethos is essential
- An informed awareness must be built
  - Without it little or no material will be added
  - Neglecting advocacy will result in repository decline

Advocating Repositories

- Some guidance from Partner Experience
  - Based on discussions with SHERPA Partner Officers
  - Meeting held in December 2006
- Focussed on advocacy successes
  - As well as challenges
- No hard and fast rules
  - Each institution has different approaches
  - What has worked well for some *might* work others
- The right level of engagement is crucial
  - E.g. *Selling technical minutiae to senior management*
  - Achieve critical buy in – build on successes

7 (& a bit) Steps to Success

1. Set Achievable Targets
2. Discipline & Community
3. Educate & Clarify
4. Seize the Moment
5. Allies & Comparators
6. Enable Effective Deposition
7. Achieve Quick Wins
7.5…Challenges

Set Achievable Targets

- Steering group comprised of key people
  - Confers institutional *clout* backing and
  - Can drive institutional developments
  - Opens otherwise locked lines of communication
  - Must comprise realists as well as activists
- Focus on specific subject targets
  - Using contacts to find a good initial "in"
  - Then capitalise on previous successes
  - Or learn from setbacks
- Targeting specific items types
  - Papers or theses are a popular choice

Discipline & Community

- Disciplinarily differences evident but not absolute
  - One size does not fit all
  - STM aren't always the most keen to engage
- Intra-institutional publication cultures will differ
  - Arts & Humanities staff sometimes vocal supporters
  - Departments may already have Individual repositories
- Awareness of subject community differences
  - Some (e.g. Physics & CompSci) gravitate to subject repositories
  - Long term stability of IR can be seen as a major advantage

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Educate & Clarify

- Stakeholders will have many concerns and questions
  - SHERPA site offers guidance and suggested resolutions
- Common questions have included:
  - What about quality assurance & peer review?
  - If its freely available, what about plagiarism?
  - What about commercially or ethically sensitivity material?
- Subject base more natural for some disciplines
  - IRs can act as ingest mechanism for subject repositories
  - Likely stability and longevity of IRs
- What about a possible threat to journals?
  - Evidence to date shows co-existence possible
  - Brussel's declaration (Feb 13th)

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Seize the Moment

- Prepare and capitalise on serendipitous opportunities
  - RAE or review can focus attention on research visibility
  - Discovering a champion or change agent in a senior position
  - Useful in getting intermediaries & administrators on-side
- Need marketing plan and core-message ready ASAP
  - *E.g. Publication alone is not enough*
  - Reward participation or at milestones
- Use in-house publications
  - Internal and external publications can be useful
  - Deadlines may be set months ahead
  - Publish your own one off

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Use Allies & Comparators

- Take advantage of competitiveness
  - Comparators proved useful within the SHERPA Partnership
  - Jealousy can be a powerful motivating force
  - Sites like OpenDOAR can help you find comparators
- Readers frustration
  - Unable to locate full-text via Google or e-journals
  - Locate within the local repository
  - Persuasive proof of concept once repository is working
  - Choose examples with care

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Enable Effective Deposition 6

- Deposition is part of the publication process
  - Community awareness of OA and repository advantages is essential
  - Encouraging differing version retention of articles can smooth effective deposition
  - Back up advocacy promises & targets
- Labour intensive methods have proved poor successes
  - Searching for articles published
  - Then seeking permission to deposit
- Departmental or institutional mandates
  - One way to fill a repository quickly
  - Risk of raising ire and entrenchment
  - Ensure that staff can cope if implemented
  - Ensure benefits are reflected in core message

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Achieve Quick Wins 7

- Metadata only repositories
  - Can be a stepping stone to successful deposition
  - BUT confer less advantage to the user research community
  - Clear differentiation of full-text items from metadata only essential for end-users
- Enabling administrative staff
  - Overcomes academic time concerns
  - Can act as effective advocates themselves
  - Risks disengaging academics from the wider debate
- Controlling the situation
  - All staff need to stay on message
  - From small successes greater ones can be built

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Facing the Challenges 7.5

- Even slight barriers are enough
- Fixed term posts & funding
  - Worries for longevity of some repositories
  - High expectations for short timescale
- Unrealistic targets
  - Quantitative focus by observers a poor success metric
  - Is it better to establish quality over quantity?
- Real cultural change is a crucial achievable
  - Need real engagement from and with academics
  - But takes an uncertain amount of time and effort
- Advocacy fatigue
- Operating in isolation
  - Thankfully rarer today thanks to SHERPA, UKCoRR & RSP

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Conclusion

- Advocacy has been the key to successful cultural change
- Experience across the partnership has developed some useful guidance
- Network of practitioners helped overcome repeating errors
- Appreciation of the unique research culture of the institution is vital

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Question Time

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