SHERPA Roadshow
- 6 -
University of East Anglia,
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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

http://www.sherpa.ac.uk

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

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 sensitive 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)

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

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
Enable Effective Deposition

- 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

Achieve Quick Wins

- 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

Facing the Challenges

- 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

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
Question Time