But first…

- A quick show of hands
- How many of you have a repository?
- How many of you are developing a repository?
- How many of you are confident you know enough about Open Access?

Who are SHERPA?

- Securing a Hybrid Environment for Research Preservation and Access (SHERPA Project)
- Original project 2003-Jan 2006
  - Now ongoing project based team
  - Funded by JISC, CURL, OSI, SPARK Europe, Wellcome
- Work activities include
  - Assisting in set up & develop of institutional repositories
  - Investigating related issues, disseminating experience & advice
  - All projects relate to scholarly publishing & Open Access
- Core team based at University of Nottingham, UK
  - Partner Officers based at UK Universities
SHERPA Project Activity

- JULIET, SHERPA/RoMEO
  - Authors’ rights, IPR & funding mandates
- OpenDOAR, Intute RS
  - Discovery & search services
- SHERPA DP, PROSPERO & The Depot
  - Preservation & long term access
- DRIVER, EThOS, SHERPA Plus & Repositories Support Project
  - Repository development & administrator support

Global Dimension of OA

Repository Typology
Identifying Current Concerns?

- SHERPA Roadshow
  - Toured UK visiting 10 locations
  - Expanded on SHERPA Partnership experiences
- Snap shot of the current UK OAR scene
  - Examined challenges faced by repository administrators
  - Outcomes feeding into UKCoRR

Concerns Post-Roadshow

- Copyright & IPR: 22.7%
- Professional Networks: 6.1%
- Case Studies: 16.7%
- Policies & Workflow: 10.6%
- National & International Developments: 13.6%
- Technical & Software: 3.0%
- Digital Preservation: 4.5%
- Audience: 4.5%
- Advocacy & Outreach: 4.5%

Sample Jan-Apr 07, n=124

(1) Copyright & IPR

- Comprehending OA & retained rights
  - Deliberate obfuscation?
  - IPR in general
- Copyright on older items
  - Not a priority for all
- Dealing directly with publishers
  - Case by case basis for some items
  - With academics to secure retained rights
- Understanding the publishers’ viewpoint
  - Dealing with embargoed items

(2) Case Studies & Sector Developments

- The role of the library
  - Integrated in advocacy & communication issues
  - Cataloguers generating record metadata
  - Uninvolved as seen to be a research led area
- Publisher relationships
  - Between academics
  - From learned societies
- Administrators
  - Training and developmental needs
  - Relative isolation from other activities at the institution
(3) Technical & Software

- Ingest of complex objects
  - 3D, multimedia, datasets & AV
- Consideration of multiple levels of ‘O’A
  - Not readily implementable
- Use of APIs to enhance services
- Interface customisation
- What software to use?
  - DSpace & Eprints popular as Open Source
  - Fedora as tool-kit gaining in popularity
  - Bespoke developments
  - Forthcoming upgrades

(4) Policies & Workflow

- Project planning
  - Where is the funding coming from?
  - What’s the sustainability strategy?
  - Outsourcing or in-house hosting
- How will the repository be staffed?
  - Repurposing in-house staff
  - New staff
  - Practicalities of ingest procedures
- Devising author/repository IPR agreements
  - What rights do authors have in the re-use of their items?
- Relationships to subject repositories
  - E.g. UKPMC, arXiv etc.
(4) Policies & Workflow

- Training and development needs
  – Skill set crosses many domains
- Avoid reinventing the wheel
  – SHERPA Partnership as one good example
- Unique situations
  – Common problems & resolutions
  – Not always the case
  – Difficult to identify comparators
- Useful initiatives not always highly visible

(5) Professional Networks & Support

- Advocacy campaigns
  – SHERPA’s 7.5 pillars of advocacy
- Advocacy fatigue
  – So many messages, so little time
  – Negative and hostile responses
  – Uncertain amount of work to effect change
- Dealing with departments
  – Internal politics, disciplinary differences
  – Reluctance from academics to engage with OA
- Internal and external mandates
  – Mixed reaction

(6) Advocacy, Audience & Outreach

- Advocacy campaigns
  – SHERPA’s 7.5 pillars of advocacy
- Advocacy fatigue
  – So many messages, so little time
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Practicalities, Services & Support

- SHERPA Website
  – Past presentations & advocacy advice
  – Partner generated materials
  – Guidance for authors on various issues
  – Guidance for repository administrators
  – Partners & Affiliates services
- DRIVER Support & RSP sites
  – Also offering & developing reusable materials
Practicalities, Services & Support

- **OpenDOAR**
  - Quality target for resource search engines
  - Tools for generating bespoke repository policies
  - API allowing data reuse and representation by external services
  - Email distribution service to enable community exchanges

- **SHERPA/RoMEO**
  - Author retained rights in plain English
  - Quality assured by publishers
  - Incorporating specific journal variations (soon)
  - A lobbying tool locally, nationally & globally

- **JULIET**
  - Implications of funding mandates
  - Linked to RoMEO

- **Repositories Support Project**
  - 2.5 year JISC funded across England and Wales
  - Moving from outreach to support
  - Providing training, mentoring, advice & enquiry resolution
  - Particular support for matched funding institutions

- **UKCoRR**
  - Professional society for repository workers
  - Focus on practical issues and real concerns
  - Inaugural meeting 21st May University of Nottingham

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Conclusion

- There are many concerns for repository administrators
- The global scholarly communication debate is not an easy one to engage in isolation
- SHERPA services and projects exist to support the OA movement in the UK