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CNI-ARL Digital Scholarship Planning Workshop

November 9, 2017

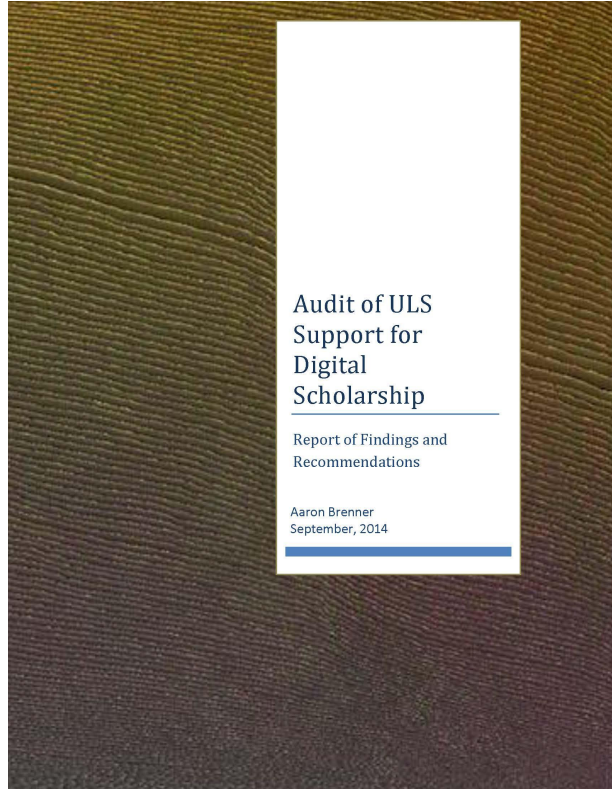@abrennr

my context:

Pitt: 32,000 students, 13,000 faculty and staff

The ULS: 200 librarians and staff

2014 Audit of Support for Digital Scholarship

Audit of ULS
Support for
Digital
Scholarship

Report of Findings and
Recommendations

Aaron Brenner
September, 2014

Today:

1. The context and design
2. Some findings, then and now
3. Thoughts on the method

1. The context and design

our local developments
&
activity elsewhere

our challenges:
underdeveloped in DS
but more crucially
not in position

developing the audit project

some keys:
listen and learn
(don't ask about the library)
snowball sampling

2. Some findings, then & now

digital scholarship as a core organizational competency
(but no single way to achieve it)

(we've had good luck encouraging staff to become practitioners themselves)

different levels of partnering

experiential learning opportunities for students (going beyond workshops)

user-friendly infrastructure
for web sites
(networked scholarship)
is still hard

digital stewardship is a clear need,
library's role is clear,
but filling the gap is hard

spaces to raise the visibility of work

new things we didn't anticipate...

it's OK,
we're in better position to hear and respond

3. Thoughts on the method

measuring what's known
vs.
discovering unknown

a "study" provides signaling and cover

developing social infrastructure

outcomes from our process

- registered library's interest and stake in key areas
- repositioned library as *listener* instead of *seller* of services
- a gateway to partnerships, participatory design in spaces and services
- gentle advocacy
- builds relationships, identifies networks
- seeds spaces and services with users

Thanks!

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Aaron Brenner, speaker notes from CNI-ARL Digital Scholarship Planning Workshop, November 9, 2017
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Intro

I'm very glad to be here today; thanks to the organizers for having me and for making this workshop happen.

I'll start with some context about me, because I'll be describing work that was very based in my local environment, and I realize there are many different types of roles and institutions participating here. Pitt is a research university with around 30,000 students; within the library we have around 200 employees. While acknowledging there are certain characteristics and dynamics specific to my kind of institution, I've also tried to generalize my story where I can in the hope that whatever is useful might also be applicable to your context.

In my short talk this morning, I'm discussing the 2014 project that I worked on at the University of Pittsburgh, which we called a [Strategic Audit of our support for Digital Scholarship](#). This was a information gathering and strategic planning initiative for the library, but in many ways the activity of the project itself had a transformative effect that went beyond gathering information. I'm going to try to touch on that today. Because the report was part of your reading assignment, because it focused on our own local environment, and because my time is short, I'm not going to spend a lot of time going over the specific content of the report, its findings and recommendations. I *am* going to talk about some things that I hope might be useful that wouldn't be obvious just from reading the text. There are three parts to this: The first is the context for this strategic audit and the design of the project. The second is looking at a selection of its findings and recommendations three years on. The third part is some reflection on the value of the method itself.

The story and design of the audit

This story starts in Fall 2013. In our local environment we could sense things developing around the university that we needed to be engaged with: research data management; a growing digital humanities community, especially faculty who self-identified and self-organized around DH; faculty hires in digital roles across humanities and social science departments; and those same departments talking together about how to better incorporate digital methods and tools into their curriculum.

Elsewhere, we were seeing related things happening in libraries and higher ed: as one specific example, several of us were enthusiastically reading and passing around Jennifer Vinopal and Monica McCormick's article "[Supporting Digital Scholarship in Research Libraries: Scalability and Sustainability](#)" and talking about the study and thinking behind that paper.

Our challenge at the time is that we had little to no user facing digital scholarship services (although we did have well-established programs in digital library collections and digital publishing) and no physical presence specifically supporting digital scholarship on campus. Most of our existing digital scholarship expertise was located in back-office units housed in an off-campus building (I was a part of that, having spent 12 years working with digital library development.)

Even more significant than that, while we felt the library had a key role to play, it did not have the *positioning* on campus to be considered a strong actor in this space. And we did not have the *internal organizational positioning* as well -- I'm deliberately avoiding use of the phrase "organizational structure" here because I believe it's not adequate to consider the library's organizational response to digital scholarship in terms of what would show up on an org chart.

Our library director at the time, Rush Miller, made the decision to develop Digital Scholarship with a presence in our main library, and to do this through a process that would develop it and launch the program, while also transitioning my role. That was this audit.

The project took place over 6 months at the beginning of 2014. During that time I had some release time and the vocal support of the director -- both of these were key. It meant that my role had a certain authorization and character that was not part of regular business. I functioned sort of like a consultant or researcher for the library, which had a different kind of signaling and permitted different kind of interactions and conversations.

I approached the study influenced by Vinopal and McCormick's paper, in which they interviewed a number of local faculty and a number of peer institutions. I added conversations with internal library units that had some stake or involvement in Digital Scholarship, and also a scan of the local environment and the literature. I think it was clear from the beginning that this wasn't just a matter of identifying some new service areas, but that the process would need to touch on something about the library organization.

There are a couple of specifics of the methodology to mention: the interviews were designed to not ask about our the library at all, but instead to learn about what the subjects were doing, how they were doing it, and what was important or challenging for them. It was a process of *discovery*. This was really important. Secondly, although I asked all of our liaisons for contacts to interview, this didn't turn up many leads. So I ended up using *snowball sampling*, a method of asking study subjects to recommend other subjects. This worked well and had a great side effect of helping to better reveal the network of relationships that existed.

The outcome of this process were a few things that transformed us: 1) a roadmap for development in digital scholarship, 2) a foundation of relationships across campus, 3) a basis for new positions and a new unit within the library, and 4) the impetus for a new physical presence in the main library.

Some findings then and now

I won't cover all the findings, obviously -- they are in the report. And a lot of the things that were easier to do quickly, we have done: we have established a physical space, and we've established new services around data management. I will focus on a few things here that, about three years later, still seem especially relevant but have not been easy to work on.

- The first recommendation in the report said that digital scholarship should be treated as a core service of the library, rather than the responsibility of a single unit. Getting library staff, broadly, connected to digital scholarship is a challenge, and cross organizational structures seem necessary. There is no single obvious model to develop staff capability. We have had the most success developing staff as practitioners rather than service providers, for example through digital humanities interest and practice groups.
- There are **different levels of campus partners**. In our case, one of the strongest, anchoring partners was our School of Information Sciences, now the School of Computing and Information. Some of our other partners contribute programming, such as leading sessions in our digital scholarship workshop series.
- Faculty want their students to have **experiential learning opportunities** with digital scholarship, beyond workshops. We are still working towards things like library-hosted digital scholarship projects that can be used as learning and training opportunities for students.
- User-friendly website and related technical infrastructure for "networked scholarship" is ongoing problem. There are resources available, but accessing them can be difficult, and often require someone to play the role of a systems administrator.
- There is a clear and consistently desired role for the library in long-term stewardship of digital scholarship, especially around providing publishing infrastructure (including things liking minting and registering persistent identifiers), metadata/ontologies, and preservation.
- There is an ongoing need for **spaces that raise the visibility of work**, where students and faculty can exhibit and share digital scholarship. This applies both to finished work and works in progress.
- Things can emerge quickly, and it's less important to try to anticipate them all. It's more important to be in a position to hear them and participate in how they are realized. In our case, examples include 3D and VR technology; civic open data -- neither of these were included in the original audit report but have become large areas of interest at Pitt.

On the method

And a few points about the value of the method. In libraries, we like to survey. A few years ago I remember reading the [Ithaka S+R library survey](), which asked directors how their library

gathers feedback and information about library services and collections. The results showed that, after informal conversations with students and faculty, by far the next most common means of gathering feedback was through surveys. I would argue that surveys are better at measuring known things -- such as how many people are aware of a particular existing resources -- but are not good for discovering what is unknown, or discovering what is nuanced and complex. Rather than a survey, the methods of this project were modeled on qualitative research, using semi-structured interviews and qualitative coding. (And as an important side note, designating something as a special study, rather than, say, an "environmental scan," does some useful signaling, as does adopting semi-formal research methods. It gives cover to things like cold calling people locally and nationally; it also gives cover to gather people internally and to ask difficult questions of the organization.) Qualitative research like this is an inherently social activity, in fact it is an activity of social *exchange*. Some writers have called a researcher doing qualitative work a 'human instrument of data collection', and sometimes the role of the researcher as an influencer is called into question; the "observer effect" is usually discussed negatively as something that might bias or invalidate findings. But in this case the work helped to develop a *social infrastructure* on campus around digital scholarship in which the library was a significant actor. Some significant social outcomes from the method used:

- registered library's interest and stake in key areas
- repositioned library as *listener* instead of *seller* of services
- a gateway to partnerships, participatory design in spaces and services
- gentle advocacy
- builds relationships, identifies networks
- seeds spaces and services with actual, not hypothetical users

Thanks, and I look forward to the discussion!