

Strategies of Effective Open Access Outreach Services to Researchers: A Qualitative Study

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Introduction & Objective

Many academic libraries now offer support services to assist researchers in making their outputs open access (OA) and in complying with funder OA policies. The focus of this qualitative study was on outreach efforts to raise the awareness of researchers about OA, their funders' policies, and the services available to support them.

Objective:

To determine effective strategies and characteristics for OA outreach to researchers.

Methods

Data Collection:

- Semi-structured interviews; followed a guide of 8 questions; lasted ~45-60 mins
- 14 participants at 7 research intensive institutions in U.K. in late 2015
- Participants all had some responsibility for communicating with researchers at their institutions about OA and assisting them in complying with funders' OA policies
- Audio digitally recorded then transcribed

Data Analysis:

- Transcripts analysed for dominant / recurrent themes in NVivo
- Inductive method of coding (themes emerged directly from the data)
- Numerous sub-themes grouped under 4 main themes

1. The Message

"Just call it, if it is [a] boot, call it a boot. Just call it what people out there would call it. I think it needs to be clear, simple."

-Participant #4

Main findings:

The message needs to be:

- Clear, simple, jargon-free – as much as possible; & relevant/timely
- Flexible – adapted to audience; integrated into other outlets
- Repeated – need persistence, patience (related to Theme 3)



3. Qualities of OA Service Provider

"Academics will sometimes test you as somebody trying to sell the message and once they realize you probably know more than they do then I think they start to buy in a little bit more..."

-Participant #6

Main findings:

Qualities needed of the "OA Service Provider" (not always a librarian):

- Expertise & Credibility – knowledgeable, prepared (*Informers* can help); experience as a publishing researcher
- Depth of knowledge – details of complex policy environment
- Diplomacy & Perseverance – able to navigate complex institutional politics with tact; keep repeating message (related to Theme 1)



2. Key Contacts & Relationships

"It might be the head of the department needs to take ownership. We do notice that if the head takes ownership things happen."

-Participant #8

Main findings:

- Key Contacts – find and nurture relationships with:
 - *Influencers* – high level administrators; peer level champions
 - *Informers* – dept. staff can advise of best outlets for message; & potential local concerns/challenges to address
- Build these relationships; get out there in person



Extra Theme: 4. Advocacy vs Compliance

"I'm really nervous that this is what it's going to end up being seen as...that open access is purely a box ticking compliance exercise."

-Participant #9

Main findings:

Tension – advocating for "public good" of OA vs focusing on compliance with mandates; limited time, need to prioritize message

- Sticks work better than carrots to motivate change in behavior
- Focus on compliance draws attention away from benefits of OA
- Danger: OA is seen as (yet another) administrative burden



Acknowledgements

Sincere thanks to:

- All of the participants who agreed to be interviewed for this study
- Individuals consulted at JISC, RLUK, and others when determining the 7 institutions of focus
- S. Berg, C. Pytlyk, and S. Lucky for advice and guidance in planning this research

This research was funded by a local P-SSHRC award at the University of Saskatchewan.



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