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How to Run a Scholarly Society Outreach Committee in Challenging Times

by **Kate Price** (Chair, UKSG Education Sub-committee) <c.l.price@surrey.ac.uk>



Introduction

The **UKSG** is a unique organisation in that it serves all parties in the scholarly communication chain. This presents a unique challenge in its goal of encouraging the exchange of ideas and facilitate community engagement and open discussion. Education is a crucial part of this remit, and in this article **Kate Price**, Education Officer of the **UKSG** and Head of Strategy and E-Resources at the **University of Surrey**, examines the work of the **UKSG** Education sub-committee, which recently reviewed its terms of reference and portfolio of activities to ensure that they are in line with both the mission and values of **UKSG** and the needs of the wider scholarly information community.

Existing Activities

UKSG holds a major international conference in Spring and a one-day conference focusing on a single topical theme in Autumn, both of which are organised by the National Committee. Beyond these high-profile events, the Education Sub-committee has organised the following well-regarded activities for a number of years (albeit under different names at times):

- **UKSG** Introduction to Serials and E-Resources Today seminars
- **UKSG** Electronic Resources Technical Update seminars
- **UKSG/COUNTER** Usage Statistics workshops
- **UKSG** Student Roadshows
- The organisation of a number of free student places for the annual **UKSG** conference.

Further details about all of these events can be found at www.uksg.org/events. Seminars, workshops, and roadshows are held at various locations throughout the UK and Ireland, and forays into foreign parts have also taken place with seminars held in Denmark and the USA in 2007. Delegates are invited from across the different sectors which make up the scholarly information community, including library staff, publishers, subscription agents, and other intermediaries. Speakers are drawn from a pool of current practitioners across these different sectors, as well as independent consultants with relevant expertise.

Background to Strategic Review

UKSG began a “root and branch” review into its mission, activities, and profile in 2008. To inform this review, surveys of the membership and conference attendees were carried out, as well as two “away-days,” which involved the principal officers. The outcomes of this review clarified the aims of the organisation (which can now be found at www.uksg.org/about) and provided a strong platform on which to build for the incoming Chair and Secretary of **UKSG** and the new Chairs of the Education, Marketing and Research Sub-committees, who all began their three-year terms in April 2009.

Continuing the theme, the incoming Education Officer began reviewing the activities of the Education Sub-committee, a process which encompassed both the training and outreach events that were currently underway, and the structure and activities of the committee itself. Several well-known tools for producing future strategic objectives were also employed during a day-long brainstorming session in September 2009: SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis; PEST (Political, Economic, Social, Technological) analysis; and the composition of a service/market matrix.

The process allowed the sub-committee members space and time to reflect on the challenges ahead for both **UKSG** and its constituent members, and produce a set of coherent plans for the ways that the Education Sub-committee would tackle these challenges.

Sub-committee Structure and Membership

At the risk of being accused of navel-gazing, it is important to take the opportunity to review committee structures once in a while to ensure that they are fit for purpose. In the case of the Education Sub-committee, this was achieved through a short survey which examined

the expectations and opinions of the current sub-committee members, and a brief discussion of the outcomes of the survey held during the brainstorming session mentioned above, which also served to agree to ways forward for the committee.

Through this process we found that:

- **UKSG** has a strong and consistent set of values that the sub-committee members were happy to uphold: education and development; impartiality; collaboration; quality and professionalism; and practical contributions by individuals.
- Membership of the sub-committee was valued for a number of reasons, including the opportunity to form support and information networks amongst professionals in their own and other sectors and the chance to rise to challenges and develop professionally.
- There were several factors which would enhance motivation and a sense of purpose amongst the members, including formal terms of reference for the sub-committee, a coherent set of objectives for the next three to five years, further recognition of the work of the committee (e.g., through reporting at the main conference), better communication between the various different **UKSG** sub-committees, and delegation of responsibilities/projects to individual committee members, together with a certain amount of regular prompting from the chair!

Given **UKSG**'s role as an organisation which spans the wide range of interests and activities across the scholarly information community, the importance of a mixed membership for the sub-committee has remained unchanged. Hence, at the time of writing the committee includes seven librarians from different types of library, a representative from the **British Library**, four members from the publishing sector, and three from different types of intermediaries (subscription agent, negotiation agent, and technology and services provider). The full list can be found at www.uksg.org/committees.

One swift outcome of the review was the production of terms of reference for the committee for the first time. This includes aims and objectives, the specific responsibilities of the sub-committee, and arrangements for selecting the chair and members, holding meetings, and communicating with other sub-committees.

Environmental Analysis

As well as enhancing the committee's ability to perform, it was also vitally important to assess the environment in which we were working, before proceeding to produce a plan for work for the next few years.

This was achieved firstly through a PEST analysis, which identified the following themes, amongst many others:

- **Political:** A change of government and likely cut-backs on public services
- **Economic:** Worldwide recession and spending reductions affecting training budgets heavily
- **Social:** Internationalisation, green/sustainability issues, the rise of social networking applications
- **Technological:** Introduction of platforms for online training, use of Web, and email for effective training and awareness

Secondly, through a SWOT analysis of the existing activities, which identified a number of factors including:

- **Strengths:** Strong brand identity with cross-sectoral reach
- **Weaknesses:** Attempting to please all of the people all of the time dilutes efforts
- **Opportunities:** Social networking and Webinar technologies allow new ways of offering training
- **Threats:** Competition from other training providers is increasing all the time

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Production of Strategic Objectives

Next, a Service/Market Matrix was composed, which allowed the committee to assess the risks inherent in moving in new directions and to set priorities which would ensure that core activities were maintained whilst diversifying into new areas in a sustainable manner (See Fig. 1 below).

Fig. 1. Service/Market Matrix

	Current Services/Products	New Services/Products
Current Markets	<p><i>Low Risk Market Penetration</i> More of the same services to more of the same sort of people</p> <p>Example: Suggest further events to delegates after attendance at a UKSG event.</p>	<p><i>Medium Risk Service Development</i> Different services to the same people</p> <p>Example: Move into further topic areas such as financial management and cataloguing</p>
New Markets	<p><i>Medium Risk Market Development</i> Same services to different people</p> <p>Example: Arrange "managing e-resources events" aimed at librarians in Further Education.</p>	<p><i>High Risk Diversification</i> New services to new people</p> <p>Example: Run courses for end-users (e.g., awareness of open access)</p>

Finally, taking all of the work above into account, a set of strategic objectives was produced by the sub-committee, discussed and refined in subsequent meetings, and then agreed by the UKSG Main Committee. The sub-committee is now working towards these objectives and in the last year has made considerable progress, including:

Using New Technologies — The "UKSG Introduction to Serials and E-Resources Today" seminar was re-purposed as a series of three Webinars. These were held over successive weeks and attracted over 40 delegates.

Reaching Out To New Colleagues — The Webinar attracted attendees from a total of seven different countries, whilst the introduction of the UKSG/NASIG **John Merriman Award** facilitated a conference exchange between UK and USA librarians. A new event "UKSG E-Resources for Further Education"

successfully attracted many delegates from the tertiary education sector, who had never attended UKSG events before.

Introducing New Topics — Three new seminars have been added to the portfolio of events: UKSG Licensing & Negotiation Skills, UKSG Money Matters, and UKSG Usage Statistics for Decision Making.

Raising the Awareness of Future Professionals — The UKSG Student Roadshows have been re-branded as "Journals and E-Re-

work activities had to come first. Now, in an environment when re-structuring is common and posts are left unfilled in order to save money with the gaps being covered by those who remain, the time available for professional and developmental activities is under further strain. When family and personal pressures (also known as real life) are added to the mix, it can be tempting to leave the "luxury" of professional development to one side.

However, UKSG firmly believes that continuing professional development is an essential rather than a luxury. Individuals need to build up networks of contacts and support, as well as enhance their skills and make others aware of them, against the day when they may need to change direction very fast indeed. And the moral support and informal information sharing that goes on, whether through attending a workshop, or being a part of the committee that organises it, is truly invaluable!

Conclusion

Over the last eighteen months, the UKSG Education Sub-committee has undergone a process of reviewing its activities and putting in place new strategic objectives. These developments will allow UKSG training events to evolve alongside the profound changes occurring in the scholarly information community, and indeed the wider world. Whilst acknowledging that we are living through difficult times right now, having the opportunity to consider in some depth the ways in which we can help fellow professionals to gain and maintain an edge through professional development has invigorated the work of the sub-committee and allowed us to face the future with enthusiasm and energy.

Biographical Note: *Kate Price has been Head of E-Strategy & Resources in the Library & Learning Support Services Department of the University of Surrey in Guildford since 2003. She is responsible for the team that acquires and catalogues information resources in electronic, print, and audio-visual formats, as well as for managing the strategic shift from print to online information resources. Kate has been Chair of the Education Sub-committee of UKSG since April 2009.*

sources at Work," and efforts are underway to promote these valuable free events further and to make them attractive to the new generation of information professionals currently studying at university.

Maintaining Excellent Quality and Value for Money — UKSG training events were awarded the CILIP (Chartered Institute of Library and Information Professionals) Seal of Recognition, which provides an independent indicator of quality assurance.

Opportunities and Challenges

The principal challenge that faces those who seek the relevant skills and knowledge required to remain up-to-date in the fast-paced world of scholarly communication, as well as those who seek to provide those skills and knowledge, is one of time.

Even with the full support of employers during times of relative prosperity, important

blog post is lengthy with a lot of legalise so I will not even attempt to summarize the issues. But you know where to go if you want to know even more! <kevin.l.smith@duke.edu>

<http://library.duke.edu/blogs/scholcomm/2011/02/25/precedent-and-procedure-in-georgia/>
<http://library.duke.edu/blogs/scholcomm>

Speaking of which, did you see Kevin when he spoke at the **Charleston Conference** in 2009 at a Saturday morning plenary session re-

garding the changing system of scholarly communications? The emphasis throughout was on the challenges of planning in an environment in which little is genuinely predictable. Ain't that the truth? We are inviting him back for the **2011 Conference!**

And just got off of email with the indescribably brainy **Michael Keller** who will be our main keynoter at the **2011 Charleston Conference!** Michael says he'll have a slide set and some print outs of the current discovery & aggregation environment — the main issues, the main opportunities, and the main challenges. See you here!

As y'all might have guessed, the **Charleston Conference** directors have been hard at work to find a **theme** and to make suggestions of **new speakers**. And we always pay lots of attention to the evaluations. Did you fill one out? **Albert Joy** (who vacationed recently in Florida with his lovely daughter) has joined our group. And I was so glad to hear **Adam Chesler's** voice on our conference call. **Adam**, who is contacting speakers for a **DRM panel for Charleston**, is now **Director of Library Relations for Business Expert Press**, and will be at **ACRL** (booth #243).

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