

15 October 2024

OCLC RLP Works in Progress Webinar

Building research data management capacity through strategic collaboration

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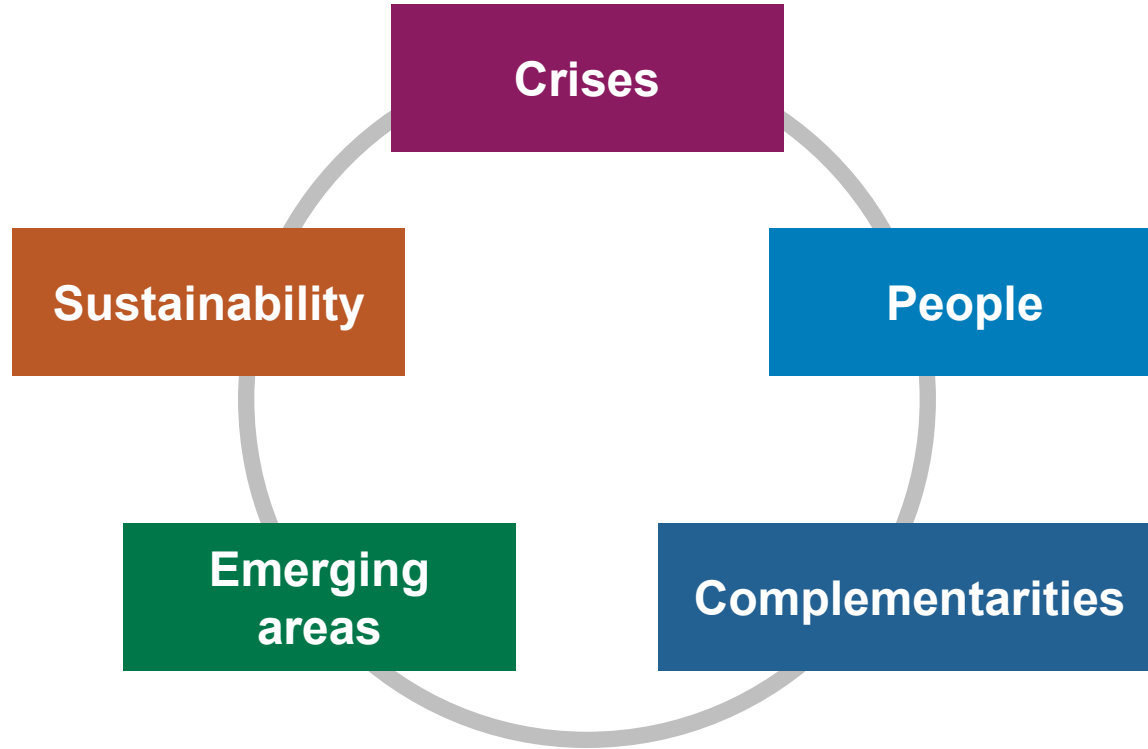
The importance of library collaboration

“No library stands alone. Library cooperation goes back to the 1880s and is a long-standing tenet of the profession. Collaboration is strongly rooted in most of our current activities.”

Valerie Horton

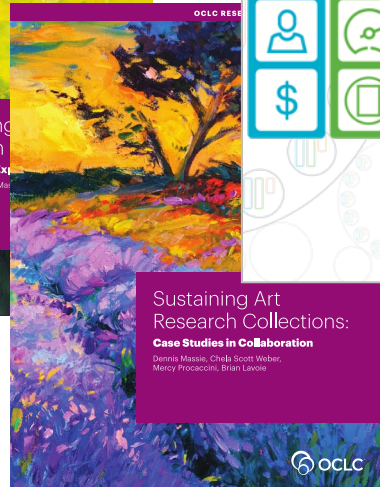
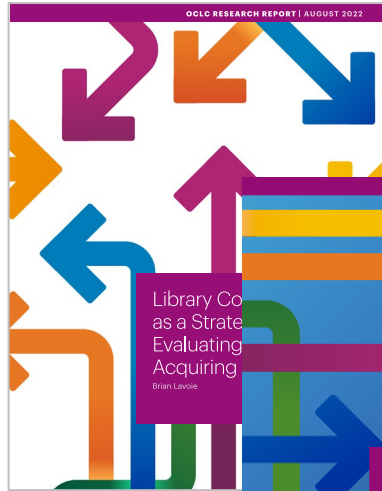
Library Consortia: Models for Collaboration and Sustainability

Collaboration is important because ...



Library collaboration and OCLC research

Recent OCLC research on collaboration



A multi-faceted exploration of collaboration...

Collaboration scope:

Across institutions
Within institutions

Library type:

Academic libraries
Public libraries
Special libraries

Domain:

RDM/research support
Art research
Collection management

Research focus:

Thought leadership
Practitioner experiences

A multi-faceted exploration of collaboration...

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“Effective library collaboration is art as much as science. While concepts, frameworks, and theory are important for deepening our understanding of what makes collaborations successful and sustainable, we believe that sharing practical experiences of successful collaboration is also essential.”

*Building Research Data Management Capacity:
Case Studies in Strategic Library Collaboration*

Library collaboration in the RDM space

Interactive poll:

- In a word or phrase, describe the biggest practical challenge to collaboration that you have faced (up or down vote).

[PollEv.com/oclc](https://www.pollEv.com/oclc)

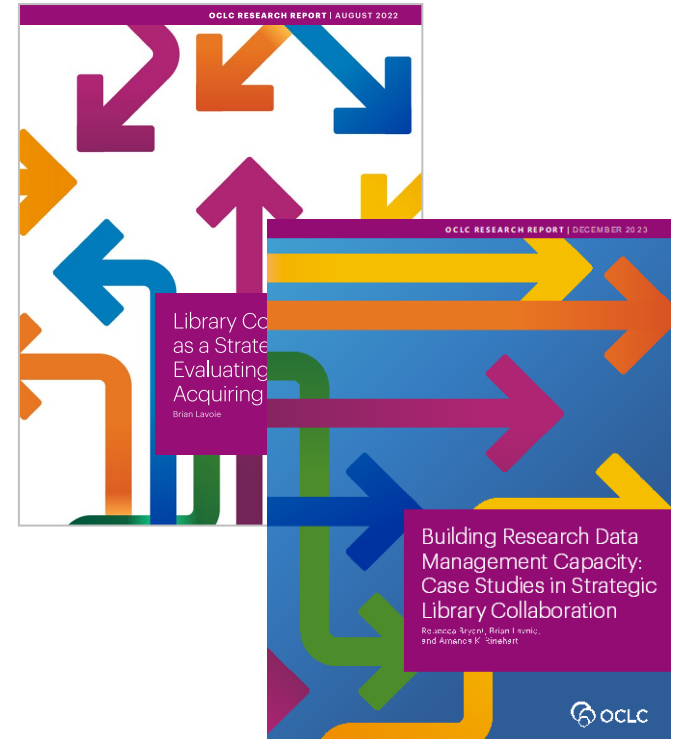
Library collaboration in RDM

OCLC Research project that produced two reports exploring theory and practice of library collaboration

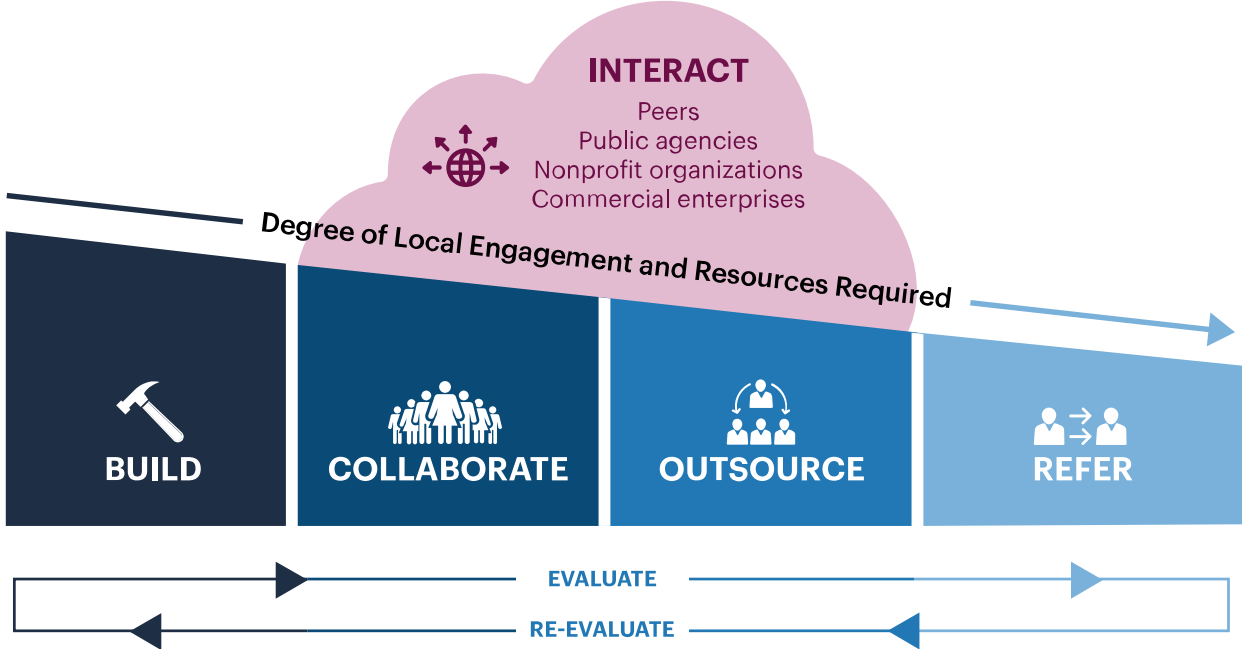
Mixed methods approach:

- Theoretical analysis (choosing among alternative sourcing options, identifying priorities and managing trade-offs, overcoming obstacles to effective collaboration)
 - Qualitative analysis (case studies of successful RDM library collaboration)
-

Motivated by idea that collaboration is a strategic choice



Four Sourcing Strategies for Libraries



“Four Sourcing Strategies for Libraries” by **OCLC Research**, from *Library Collaboration as a Strategic Choice: Evaluating Options for Acquiring Capacity* (<https://doi.org/10.25333/mt16-0c57>), **CC BY 4.0**



Takeaways

Collaboration should be a strategic decision

Identify priorities, pick best fit, and manage trade-offs

Understand what drives effective collaboration

Question of HOW is just as important as WHAT

OCLC RESEARCH REPORT | AUGUST 2022

Library Collaboration
as a Strategic Choice:
Evaluating Options for
Acquiring Capacity

Brian Lavoie



Library Collaboration as a Strategic Choice:

Evaluating Options for Acquiring Capacity

<https://doi.org/10.25333/mt16-0c57>

The realities of collaboration: RDM Edition

**Texas Data
Repository**

**Portage
Network**

**Data Curation
Network**

- **What is the collaboration origin story?**
- **Why was collaboration chosen as the strategy for acquiring capacity?**
- **How did the partners act collectively to achieve their goals?**
- **What are the costs of collaboration?**
- **How does the collaboration align with established stakeholders & workflows?**
- **How does decision-making take place?**

Case study: Texas Data Repository

Leveraged Texas Digital Library's **existing membership** and track record of collaboration

Created **deep collaborative infrastructure** of working groups, steering committees, and extensive documentation

Cultivated community through planning, implementation, and maintenance

Supported inclusive participation by recognizing differing priorities and resourcing means contribution and benefits won't be equal

Today:

- Shared repository for TDL membership to openly publish data sets
- Community of practice within collaborative setting
- Used by 14 TDL member institutions; over 1,800 data sets (Nov. 2023)
- Executive leadership ultimately rests with the TDL Director

Case study: Portage Network

Project was incubated by trusted organization that provided resources and support

Tackle discrete, well-articulated projects to build momentum through **”small wins”**

Leverage existing efforts instead of starting from scratch

Start early to remove friction of “switching costs”

Today:

- Transferred from CARL to the the Digital Research Alliance of Canada in 2021
- A library consortia led initiative has become federally funded national infrastructure
- Stability and funding came with some loss of autonomy

Case study: Data Curation Network

Began with **well-defined problem**:
to share curation expertise

Start-up model of collaboration required
significant transaction costs

Investment in planning

Trusted relationships supported growth

Today:

- Multi-institutional network for data curation
- Learning and training community
- Supported by membership dues
- Governed by a board and executive committee, rather than executive leadership

Recommendations for libraries: Three stages of collaboration

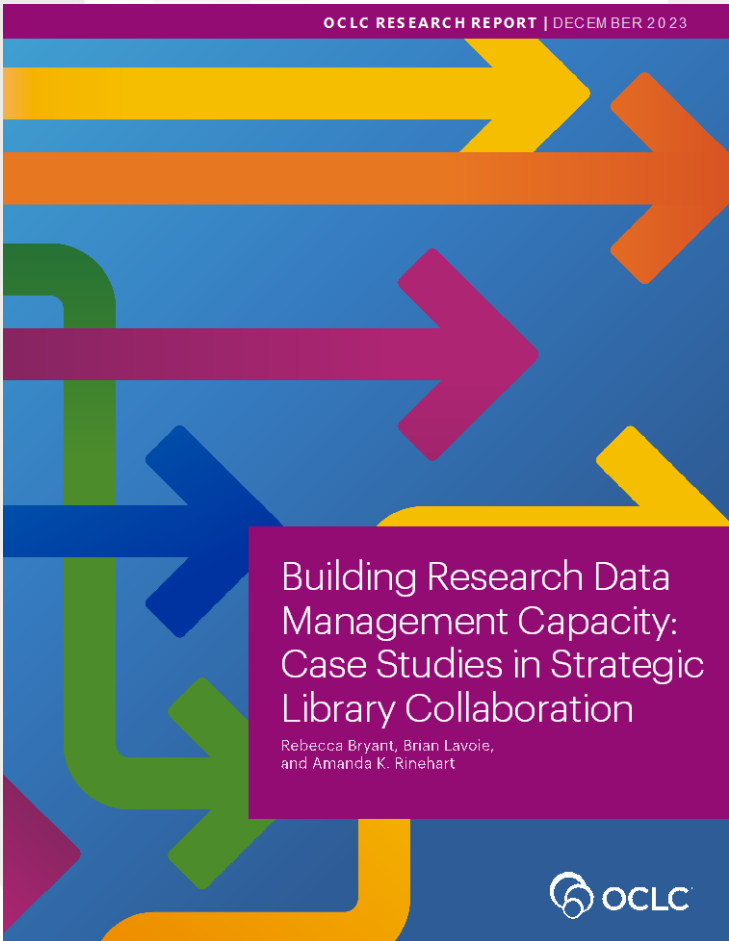
Preparing to collaborate	Establishing a successful collaboration	Stewarding for sustainability
Recognize that collaboration requires investment	Leverage preexisting trust relationships	Plan for success
Balance that trade-off between start-up and consortial models	Find your people	Be strategically ambitious and tactically restrained
Start collaborations early	Cultivate commitment	Align with institutional goals
Value the intangible benefits of collaboration		Recognize that contributions and benefits may be asymmetrical



Recommendations for libraries: Three stages of collaboration

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OCLC RESEARCH REPORT | DECEMBER 2023

Building Research Data
Management Capacity:
Case Studies in Strategic
Library Collaboration

Rebecca Bryant, Brian Lavoie,
and Amanda K. Rinehart



Building Research Data Management Capacity:

Case Studies in Strategic Library Collaboration

<https://doi.org/10.25333/ag1k-3s72>

Collaborating within the institution

Cross-campus partnerships increasingly important

- e.g., research support/RDM
-

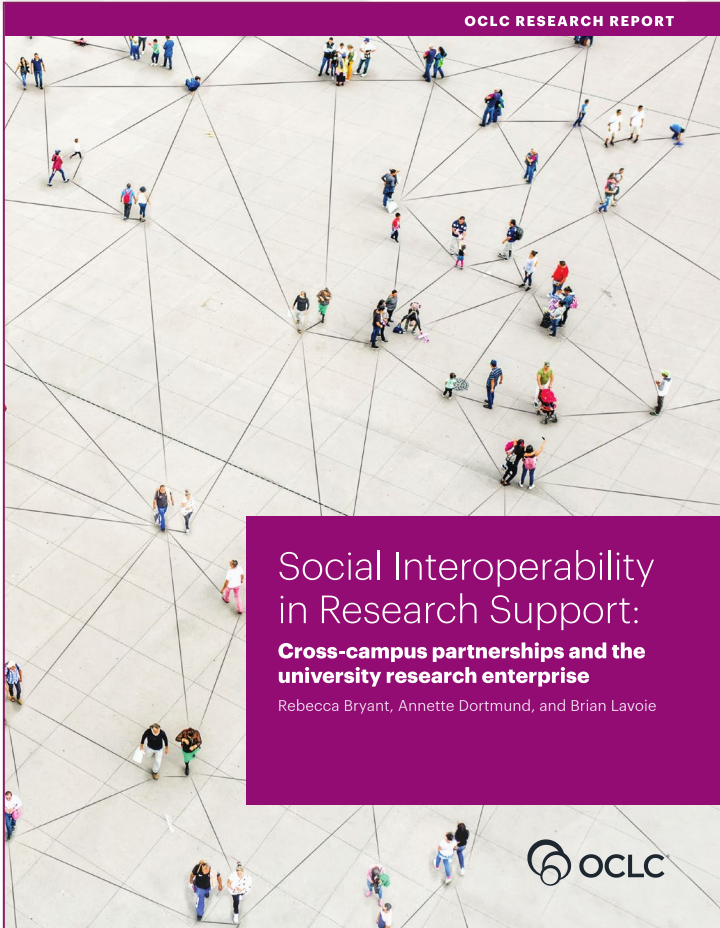
Social interoperability:

“The creation and maintenance of working relationships across individuals and organizational units that promote collaboration, communication, and mutual understanding”

Report synthesizes practical advice and recommendations

- Examines why cross-campus collaboration is so challenging
- Offers strategies and tactics for achieving social interoperability

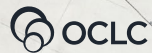
OCLC RESEARCH REPORT



Social Interoperability in Research Support:

**Cross-campus partnerships and the
university research enterprise**

Rebecca Bryant, Annette Dortmund, and Brian Lavoie



Social Interoperability in Research Support

**Cross-campus partnerships and the
university research enterprise**

<https://doi.org/10.25333/wyrd-n586>

Interactive poll

What is your library's stance on pursuing **inter**-institutional collaborations to support institutional RDM needs?

- We are currently involved in an RDM-related collaboration
- We are likely to move forward in this direction in the future
- I think this is unlikely
- Not sure

[PollEv.com/oclc](https://poll-ev.com/oclc)

Conclusion: How to collaborate

Library collaboration: Some emerging general principles

Clear articulation of tractable goals

Creative understanding of partnership
value

Sustainability through trusted relationships

Asymmetries in contributions and benefits



OCLC Research findings on library collaboration

Why?

**Pros, cons, and trade-offs:
Collaboration as a strategic choice**

Who?

**Finding and retaining collaborative
partners**

How?

**Insight and lessons learned on
making collaborations work**

The fabric of collaboration ...

Why?

Who?

How?



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- Contact me if you have a “work in progress” you’d like to share about!
- Register today

RLP leadership networks

- Metadata managers
- Resource sharing / SHARES
- Research support
- Archives & special collections

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