The holistic librarian: 23(+ 1) things for RDM at the University of Exeter

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Background

The *Open Exeter* project[1] was funded by the Jisc's Managing Research Data Programme[2] to extend the University of Exeter's pilot repository for research data, to develop institutional research data management policy and to embed training and guidance on research data management (RDM) in Exeter's research community.

One of the questions that interested the project team was where researchers at the University of Exeter go when they need RDM guidance. As well as developing specific training for researchers and postgraduate research students (PGRs), the team hoped to develop RDM skills amongst those who support researchers at Exeter. Through interviews and an adaption of the Digital Curation Centre's Data Asset Framework (DAF) survey[3] the team discovered that researchers at Exeter have a diverse support network for research data queries – they ask for help from college- or discipline-level research managers, computing development officers, as well as research development managers from the university's central Research and Knowledge Transfer Office.

So why was the team interested in developing training for subject librarians? The 2012 RLUK report 'Re-skilling for research' talks about the changing role of librarians in supporting researchers.[4] One of the aims of the *Open Exeter* project was to ensure a sustainable RDM service, and given the current financial situation, the team were wary of assuming that all their posts would be funded by the university once the project had

ended. At Exeter, subject librarians are one of the principal points of contact for researchers for open access queries. The areas of RDM and open access to research papers are tightly linked at the university. Our repository, Open Research Exeter (ORE) [5] will soon begin to accept research data as well as research papers and theses. In addition, many funders' research data policies reflect similar assumptions of openness as their open access policies; the concepts of transparency, access and reuse of research apply to research outputs in all their forms.

The Open Access and Data Curation team were lucky enough to have a Data Curation Officer post funded for two years at the end of the *Open Exeter* project in June 2013. The university's RDM policies for researchers and PGRs will be implemented from October 2013 and it is probable that the library will develop two levels of service for research data management queries. As already happens with open access queries, subject librarians may become the first point of contact for researchers for RDM within the library, and will refer more complex queries on to the Open Access and Data Curation team.

23(+1) Things pilot

We decided to use the '23 Things' format of training to allow the subject librarians to choose the best moment to do the training, albeit within a certain time framework. It was felt that the flexibility of a self-learning course was a real advantage for the team, who have busy schedules. The fact that the training is broken down into manageable chunks, or 'Things', is another plus, as it can be quite daunting to start a training course in a new, unknown subject, and participants can tick off tasks as they move through the training, giving them a sense of progression.

We developed the content of the training by thinking about the RDM queries that a researcher might have and how a subject librarian might go about answering them. The *Open Exeter* DAF survey had been completed by 284 members of Exeter's research community and was followed up by over 50 face-to-face interviews. The team analysed the information provided by researchers and also evidence gathered in other instances such as in training sessions, and put together a list of pertinent queries. The team was also clear that the questions should cover a certain range of topics, for example, ethical and legal issues, funder and institutional policy and the services that the university provides with regard to RDM.

We found that we had 24 questions, but in order to stick to the 23 Things terminology, number 24 became 23+1. The list was as follows:

1   What are research data?
2   A researcher asks if she can put video footage of children on the repository (Open Research Exeter). How would you respond?
3   A researcher wants to publish an article and the data that backs up their conclusions on open access. What options does the researcher have?
4   If a researcher came to you asking how they could share their research data with somebody outside the university, what would you recommend?
5   What is our institutional policy on Open Access and RDM and how does it compare to other institutions' policies? Are there any other institutional policies that affect research data management?
6   Where can a University of Exeter researcher store her live research data?
7   If a researcher asked you how to cite a data set, which resources could you point him to?
8   A researcher asks you about her funder requirements on research data. Where you could find out this information?
9   What is the importance of documenting research data and metadata? Where can you find useful information on data documentation and metadata?
10   A researcher has used a secondary data set in their research. In which circumstances would she be able to put this on Open Access?
11   What advice could you give to a researcher about backing up his research data?
12   What evidence can you cite that research made available on Open Access has more impact than research that is not available on Open Access?
13   A post-doctoral researcher is leaving the university and the research that she has undertaken is part of a larger research project. What advice would give her so that the research is usable by the other members of the research group?
14   A researcher asks if his research data can count as a research output for the REF. How would you find out?
15   What advice could you give a researcher about naming and organising files and folders? How would you find out this information?
16   A researcher receives a Freedom of Information request about research data. How should he proceed and what should he consider when responding to the request?

17   What types of information does the Data Protection Act cover? In which ways should this data be treated differently from non-sensitive data?
18   Which factors could affect the Intellectual Property Rights of a dataset? Where can you find guidance on this?
19   A researcher is working with a commercial partner on a research project. In which circumstances could the researcher make the research data from this project available on Open Access?
20   A researcher wants to archive sensitive research data securely for long-term preservation. What options does she have?
21   Which criteria could a researcher use to select which research data he needs to preserve in the long term?
22   What advice would you offer a researcher in order for their research data to be discoverable and visible on the internet?
23   What is the importance of licensing research data? Where can you find out more about licensing research data?
23+1 Where could a researcher go to get help writing a data management plan?

The 23(+1) things project web site

We piloted the training with the subject librarians in Exeter, and divided up the 'Things' so that each subject librarian would test three or four tasks. We asked them to use the project blog[6] to report back on the task and answer the following questions: What did you know about the topic before the task?

1   What do you know about the topic now?
2   How did you obtain this knowledge?
3   What else would you like to know about the topic?

4   How did you find this task? How would you improve it?

The 23(+1) things project blog

Each 'Thing' took approximately an hour to an hour and a half to complete (including writing up the blog post) and the subject librarian team were invited to email or meet up in person with members of the Open Access and Data Curation Team if they had any queries about the tasks. The Open Access and Data Curation Team also regularly attended subject librarian team meetings in order to capture oral feedback on the tasks and the format of the training, as well as improvements that could be made.

Lessons learnt

We learnt a lot from the feedback provided by the subject librarians. When the final version of 23+1 Things is produced we shall provide a more in-depth piece of introductory text to the training as a whole and to each Task. We shall also pull together useful links for each Thing so that those doing the training will have a starting point for their research; one subject librarian commented: 'I really needed to be pointed in the right direction, at least to get me started.'

Some of the terms used and the wording of the questions caused a bit of confusion; for example, the distinction between metadata and data documentation was not clear, nor was the idea that data are shared in specific ways at different stages of a project lifecycle. In the future, we shall provide a glossary of terms to guide those doing the training. However, we shall not include all relevant words (for example, if we included 'research data', the participants wouldn't need to

think about this for themselves in Thing 1). We are currently developing a permanent online resource on research data management for researchers, but this will not be directly associated with the 23+1 Things training.6

We shall also think about the scope of some of the questions; we asked for a comparison of different higher education institutions' research data management policies at a time when few UK universities had ratified policies. Now this would be a more time-consuming and difficult task.

It was interesting to reflect on the subject librarians' observations; for example, one person commented that there is plenty of information on research data management available on line for repository managers, librarians and data curators, but not much that is directed at researchers. Another point that was made was that diverse methods of training may be best, as people learn in different ways; for example, combining a self-learning course with training sessions, presentations and group discussions. A few of the blogs mentioned the usefulness of presentations on research data management during Exeter's Open Access week in 2012.7

What's next?

The pilot training was completed in January 2013, and we plan to repackage the course as an open, reusable resource for librarians at other institutions to adapt to their own specific requirements and services. Once the training has been repackaged, we shall test the complete course with the three subject librarians who work on our Penryn campus in Cornwall. The Exeter-based subject librarians will then be invited to complete the entire course. If resources allow we would also like to adapt the training for other audiences in the future, for example research managers and computing development officers.

Research data management is a new area of expertise for our subject librarians, and building their confidence in this area will take time. The 23+1 Things training is a step in the right direction. If the subject librarian team do take on more responsibilities around RDM, further training will need to be provided by the Open Access and Data Curation team.

The alternative name for the training was *The holistic librarian*. The thinking behind this was that librarians will need to develop wide-ranging

skills and knowledge to be ready to take on differing roles in the future.

REFERENCES

1   http://as.exeter.ac.uk/library/resources/openaccess/openexeter/ [Accessed 5.10.13]

2   ibid.

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6   http://blogs.exeter.ac.uk/openexeterrdm/blog/category/holistic-librarian/ [Accessed 5.10.13]

7   http://as.exeter.ac.uk/library/resources/rdm/ [Accessed 5.10.13]