

Developing a community of practice: Report on a survey to determine the scholarly communication landscape in western Canada

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Abstract

The Council of Prairie and Pacific University Libraries (COPPUL) Scholarly Communications Working Group (SCWG) surveyed COPPUL member libraries with a short questionnaire in November 2012. The stated purpose of the survey was to inform both the educational efforts of COPPUL with regard to scholarly communications, as well as the agenda of a proposed meeting of scholarly communication practitioners in COPPUL libraries. This paper discusses the

results in the context of the formation of a Community of Practice (CoP) since conducting the survey. The paper concludes that a CoP has not yet formed; however, it presents the challenges with the formation of the CoP, identifies some of the actions taken so far, and makes recommendations for future direction for continuing to develop the CoP among COPPUL institutions.

Keywords

open access; scholarly communications; survey; Western Canada; institutional repositories; scholarly publishing; community of practice

Introduction

The Council of Prairie and Pacific University Libraries (COPPUL) is a library consortium of twenty-three Canadian academic libraries scattered across the four western provinces, British Columbia, Alberta, Saskatchewan and Manitoba (Council of Prairie and Pacific University Libraries, 2013; Appendix B). In 2011, a task group was established with the purpose of looking into the potential role for COPPUL in open access and scholarly communication (Hohner, Vanderjagt, & Kirchner, 2011). In September 2012 the “temporary” status of the task group was changed to that of a permanent working group and renamed the COPPUL Scholarly Communications Working Group (SCWG) with the task of, among others, “engaging scholarly communication (SC) practitioners at COPPUL institutions by establishing a community of practice” (Council of Prairie and Pacific University Libraries, 2014).

Wenger (2001) describes a community of practice (CoP) as a group that is “focused on a domain of knowledge and over time accumulate expertise in this domain. They [the members] develop their shared practice by interacting around problems, solutions, and insights, and building a common store of knowledge.” Should the SCWG succeed in establishing a scholarly communication community of practice it might be the first of its kind. Indications of success in this regard would be mutual engagement and a shared repertoire among the community members as well as the negotiation of a joint enterprise to promote scholarly communication (Iverson & McPhee, 2008).

Literature Review - Scholarly communication surveys

Surveys on libraries and their services, especially as far as patrons and patron experiences/ needs/expectations are concerned, are well represented in the literature and practiced through well established instruments such as [LibQUAL+®](#). It appears that surveys on author's behavior with reference to current scholarly communication trends such as the one by Rowlands and Nicholas (2006) and Dawson (2014) are not uncommon, but investigations into scholarly

communication practices and how these practices impact academic libraries in general appear to be completely absent from the professional library literature.

International studies reflecting on the distribution and practices of specific aspects of scholarly communication, such as open access or institutional repositories were conducted by Nykanen (2011) and Venkadesan (2009). Similarly, an effort by Mondoux & Shiri (2009) to survey Canadian institutional repositories is noteworthy, but not particularly informative about the group of libraries this study focused on. It goes without saying that scholarly communication entails much more than open access (OA) or institutional repositories.

Therefore the SCWG determined that the proper engagement by member libraries required a reconnaissance of the scholarly communication landscape, as it manifested within the COPPUL member libraries. Armed with this knowledge the successful establishment of a CoP should be a more attainable task.

Problem statement

This reconnaissance took the form of a short questionnaire distributed to COPPUL member libraries in November 2012. The stated purpose of the survey was to inform both the educational efforts of COPPUL with regard to scholarly communications, as well as the agenda of a proposed meeting of scholarly communication practitioners in COPPUL libraries. Secondary goals were to determine:

- a) what scholarly communication activities libraries deemed important and
- b) the level of engagement in these activities that exists at the individual libraries.

The secondary goals were of particular importance with the view of establishing the envisaged CoP within COPPUL libraries. In determining the priorities of these scholarly communication practitioners, the SCWG would be in a better position to engage them in a CoP, by having an agenda that would include those aspects of scholarly communication that are of importance to them.

Methodology

The survey was conducted online with SurveyMonkey (<http://www.surveymonkey.com>). A link to the questionnaire was distributed via email to the COPPUL library directors by the COPPUL Executive Director. Overall the response rate (83%) to the questionnaire was very good with 20 of the 24 COPPUL libraries submitting a response.

A major challenge for the group was to identify an individual at COPPUL libraries best suited to complete the survey. Since the SCWG had not previously attempted to establish communications with SC practitioners, the group asked COPPUL's Executive Director to send a

link to the questionnaire to the library directors requesting that they forward the questionnaire to the most appropriate individual in their respective libraries. Nonetheless, the responses to question 2 (see Figure 1) indicated that 33% of the respondents were not the person primarily responsible for scholarly communication.

Are you the person primarily responsible for directing or coordinating the scholarly communication efforts at your institution? (Yes/No)

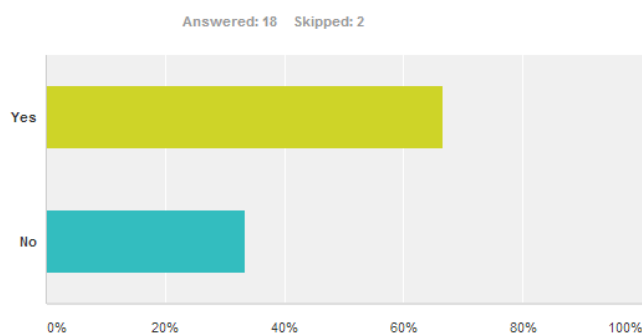


Figure 1 - Survey Respondent's Involvement in SC

Results

Considering that COPPUL libraries range from large research intensive institutions with more than 38,000 full-time students (e.g., University of Alberta/University of British Columbia) to smaller institutions with less than 1,600 full-time students (e.g., Concordia University College of Alberta) (Association of Universities and Colleges of Canada, 2014), it was not surprising to learn that the level of participation in scholarly communication activities displayed a similar diversity. In addition, the larger institutions appear to have the capacity to establish a Scholarly Communications and Copyright Office (e.g., University of British Columbia) or similar structure, while at smaller institutions like Brandon University scholarly communication activities may be one responsibility among many for one librarian. The range in institutional size is represented in Figure 2, indicating the combined undergraduate and graduate FTE numbers.

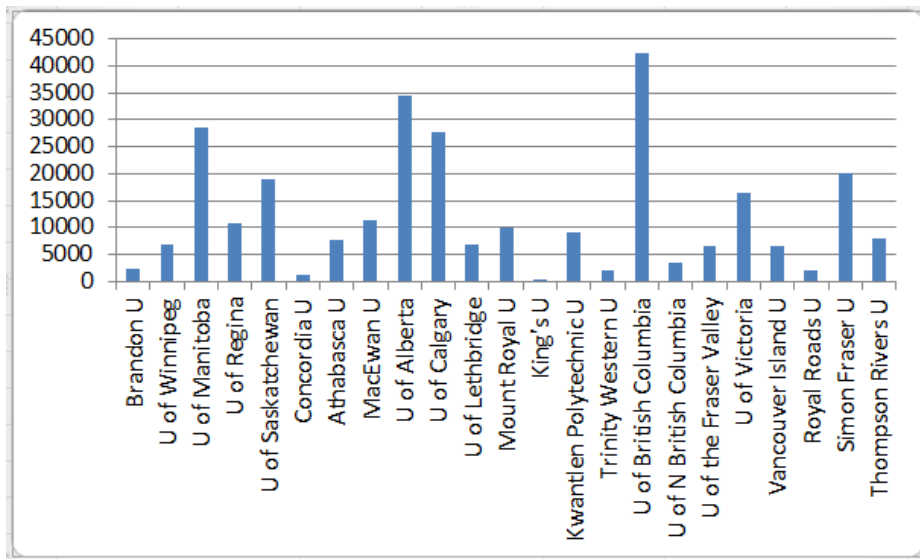


Figure 2 - Size of Institutions by FTE

Apart from asking for contact details, the other questions dealt with ascertaining the status of scholarly communication programs and activities at each library. Respondents were asked to agree or disagree with statements to activities they were currently engaged. A summary is provided in Figure 3:

- 85% held outreach events for faculty on scholarly communication topics. Half did the same for students. Two-thirds held education events for library staff on scholarly communication topics.
- 80% included scholarly communication information as part of the library web presence.
- 80% offered services such as copyright, author rights, and OA mandate compliance advising.
- 80% were interested in Open Source learning material.
- 60% included scholarly communication topics in information literacy instruction sessions.
- 60% had discussions with faculty leadership regarding an OA resolution for their institution. Four respondents indicated they either had a library mandate or were working towards an institutional mandate.
- 55% had an institutional repository (IR), while 25% planned to set up an IR in the next 12 months.
- Currently 45% libraries served as publishers and 25% planned to become publishers in the next 12 months.
- Half of the respondents indicated that job descriptions for library staff included scholarly communication duties. Two-thirds assigned responsibility for scholarly communication

activities to staff.

- One quarter had a library staff-only scholarly communication committee, while 15% included campus-stakeholder on their scholarly communication-committees.
- Only 20% had an author fund to pay for article processing charges, 70% did not intend to set up one in the next 12 months.

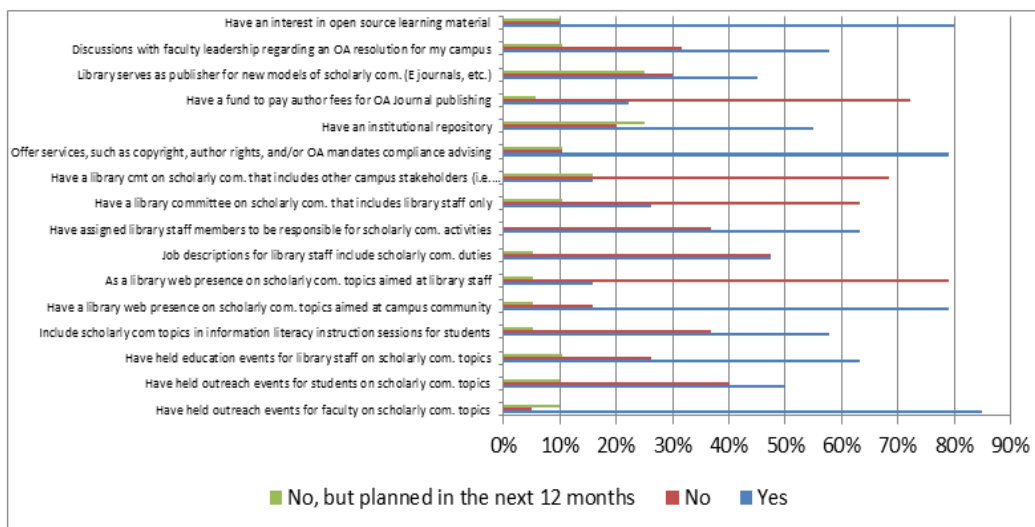


Figure 3 - Question 3: Activities in which libraries are engaged

Respondents had the opportunity to provide feedback on six open-ended questions. The questions probed if institutions had developed open access policies or mandates, what resources they required to increase awareness and knowledge around scholarly communications, and what role each institution, including COPPUL, could play in building a community of practice. A summary of responses to each questions is provided below:

1. *List here other issues with which your library is engaged with regards to scholarly communication.*

Notably, COPPUL libraries were engaged in the following scholarly communication issues: copyright, publishing or hosting open access journals, monograph publishing, data repositories, and publishing electronic theses and dissertations. Member libraries were particularly strong in the development of institutional repositories, copyright administration and services, offering open source platforms (e.g., Open Journal Systems and related products) for publishing, and digitization initiatives.

2. *What other means would be helpful to you for increasing your awareness or enabling you to speak about the issues?*

Respondents wanted information on how others: supported and hosted open access events, best demonstrated to the community the impact of open access, and archived scholarly communication lectures. They also suggested the creation of a collegial forum/bulletin board/listserv to share information on scholarly communication and activities and initiatives undertaken at other COPPUL libraries.

3. *Do you have an open access policy/main mandate/statement at your institution? Please provide details.*

Of the respondents who said yes to this question, two had library OA mandates, one was working on a library OA mandate to be ready in the next 12 months, another had a library OA resolution and three others indicated having started discussions on campus with various stakeholders.

4. *Do you have a particular strength/initiative/project at your institution related to scholarly communication that you would be interested in taking the lead with for informing/educating other COPPUL institutions about? Please provide details.*

Respondents were willing to share their expertise and leading a discussion in the following areas: institutional repository development, establishing a copyright office, hosting and managing Open Journal Systems, Open Conference Systems, Open Monographs Press, and the digitization of art material.

5. *What role do you see for COPPUL in scholarly communication? Please list the top 3 to 5 things that come to mind.*

The majority of the respondents (14/16 who answered this question) saw an educational/support role for COPPUL. Some saw a coordination and preservation role (the latter linked with Digitization and LOCKSS) for COPPUL and even negotiating author's fees on behalf of COPPUL libraries. The sharing of best practices, workshops, webinars and even providing educational material for both librarians and faculty were some of the specific items mentioned.

6. *Any other comments you would care to include?*

Some respondents expressed gratitude for the opportunity to participate in the survey.

Discussion

While many of the answers proved to be illuminating, the answers on two specific questions could be of particular significance to the establishment of a CoP:

1. Have an institutional repository
2. Library serves as publisher for new models of scholarly communication (E journals, etc.)

To both of these questions 25% of respondents indicated that their libraries currently are lacking in this regard, but indicated that they were planning to implement these or similar services within the next 12 months (see Figure 3). Specifically, twelve institutions indicated they already had an

institutional repository. Although, five institutions indicated they expected to establish an IR within the next 12 months, only three of the five institutions, however, have set up a repository since the survey. Three institutions indicated they did not expect to have an IR within the next 12 months, and, to date have not established one.

COPPUL Institutions	FTE (as of April 2014)	URL for IR (if established)
Athabasca University	7,875	http://auspace.athabascau.ca/
Brandon University	2,436	
Concordia University College	1,242	
King's University College	5,49	
Kwantlen Polytechnic University	9,077	http://kora.kpu.ca/
MacEwan University	11,465	http://roam.macewan.ca/
Mount Royal University	10,030	https://mrur.mtroyal.ca/xmlui/
Royal Roads University	1,980	http://dspace.royalroads.ca/docs/
Simon Fraser University	20,203	http://summit.sfu.ca/
Thompson Rivers University	7,986	
Trinity Western University	2,036	
University of Alberta	34,589	https://era.library.ualberta.ca/
University of British Columbia	42,237	https://circle.ubc.ca/
University of Calgary	27,722	https://dspace.ucalgary.ca/
University of Lethbridge	6,894	https://www.uleth.ca/dspace/
University of Manitoba	28,503	https://mspace.lib.umanitoba.ca/
University of Northern British Columbia	3,455	
University of Regina	10,763	http://ourspace.uregina.ca/
University of Saskatchewan	18,987	http://ecommons.usask.ca/
University of the Fraser Valley	6,688	
University of Victoria	16,528	https://dspace.library.uvic.ca:8443/
University of Winnipeg	6,951	http://winnspace.uwinnipeg.ca/

Vancouver Island University	6,636	http://viuspace.viu.ca/
TOTAL Student FTE	284,832	(□ or AVG = 12,384; σ_x or STD DEV = 11,120)

Figure 4 - COPPUL regular members with FTE counts reported, April 2014 and established IRs

As of March 2015, 23 COPPUL institutions listed in Figure 4 with URLs, have established IRs. The list includes all COPPUL regular members with their corresponding FTE counts as of April 2014 (COPPUL 2014). (Note: some of these members did not respond to the November 2012 survey). Of the 23 member institutions, 16 have established IRs. The remaining seven institutions have student FTE below the average FTE for COPPUL institutions (12,384). Should COPPUL consider establishing a shared IR for these remaining members? Setting up an sustainable IR operation requires a commitment of IT resources/infrastructure, funding and dedicated staff. Could the larger institutions with established IRs support the ones without IRs and what frameworks (policies, institutional branding, recruitment and processing content issues, etc.) need to be considered for a successful collaboration of this nature?

Involving staff who are tasked with the implementation of new IR services in a CoP should not be too difficult, as they will have many immediate questions around recruitment, process, policy development, etc. For those who have more established IRs, the question is what value does a CoP surrounding an IR hold for them?

With respect to "Library serves as publisher for new models of scholarly communication (E journals, etc.)", we found that some COPPUL institutions are already offering a number of support services. The services offered are dependent on the particular needs and interests of the local community at each institution, but limited by available staffing and other resources. Most recently, initiatives such as the CFI funded Synergies project (2015) involved several libraries across Canada digitizing several Canadian social sciences and humanities journals and helping to establish their online presence in this new digital era. For some this brought journal publishing to the forefront, but, arguably, even the Synergies project, which has now ended, could use a redux. Institutions involved in Synergies were obliged to provide ongoing IT hosting infrastructure and support for these journals. Aside from providing a journal hosting infrastructure, most institutions do not have enough capacity for assisting with e.g., interface design, author agreements, discussions around OA publishing, marketing and promotion services, etc. for these journals. The reasons for hosting a journal with a particular institution can also change, for example, changes on the editorial board which inadvertently result in the journal editor's institutional affiliation. Strong arguments could be made for offering a centralized journal hosting services, while sharing service opportunities within COPPUL. Beyond journal hosting, libraries also are serving in the capacity of a publisher in a number of other ways, such as, open monograph/textbooks, open data, and open education resources. However, libraries are stretched for resources with everyone striving to offer a full range of services with little depth. Potentially, CoPs could play a role of our member libraries in this regard.

The development of a true CoP, however, has proven to be more of a journey than a destination, and not something that has been really started so far for COPPUL. The survey did, at the very least, create the impetus for a meeting of scholarly communications practitioners and liaison librarians from member libraries. On June 10, 2013, the SCWG sponsored the ACRL "Roadshow" Scholarly Communication Workshop at the University of Alberta.

As a result of the workshop, we established a coppul-scholcom mailing list (coppul-scholcom@sfu.ca). Attendees were told that they would be subscribed to the ALA SCHOLCOMM list (scholcomm@ala.org). In December 2014, the Canadian Association of Research Libraries (CARL) also established a scholarly communications list for SC practitioners across Canada (SCHOLCOMM-CARL-L@LISTSERV.UOTTAWA.CA).

A list in itself, however, is not a CoP. There are many practitioners, sometimes involved in very detailed and nuanced discussions, which are sometimes very practical, but can also be more theoretical or principled in nature and rather superfluous to the day to day practice or even a more immediate short term development of some aspect of practice, such as an institutional repository. While news and announcements can help inform the community about certain milestones, for some, especially at smaller institutions, such news may seem irrelevant, since it may be impracticable or unachievable.

Regrettably, the coppul-scholcom mailing list has not seen much activity since its creation; however, the point of the list was to be a general clearing list for anyone in COPPUL with some SC interest (which could and should likely be just about everyone) and to bring together these like minds, perhaps to form smaller focus groups, to explore and develop certain aspects of the SC agenda within these COPPUL institutions.

Based on the survey and discussions at the ACRL workshop, the SCWG proposed, in a report to the COPPUL directors (September 2013), the creation of interest groups to engage the group in building capacity and sharing expertise, and acting as a think tank on issues. The WG proposed the following themes:

- Institutional Repositories
- Hosted journals and scholarly publishing
- Research data management
- Open data and open government
- Policies and mandates

Each interest group was to be facilitated by a SCWG member to ensure engagement of the group and ongoing connection with and direction from the SCWG.

Unfortunately, there have been numerous challenges in executing this plan and making any significant progress in forming the CoP, from a change in leadership and membership on the committee to just finding the time. As mentioned, there are also challenges in dealing with the diversity of size with a range of small to large institutions within COPPUL. Generally, smaller

institutions do not have a dedicated individual working on SC, while larger institutions may have a complement of staff working on SC. Who should lead and who should participate and what value is to be gained from collaboration among COPPUL institutions is not always clear. Even more of a challenge is responding to other national and international opportunities and trends with SC.

Next Steps

All the founding members of the COPPUL SCWG have or will soon be ending their membership with the committee. New members have recently joined the committee. It might be useful if they continue the work and be able to move the CoP agenda forward.

Based on the results of the current survey, there are several areas for further investigation:

1. The survey data provides an indication of the status and strength of OA activities and programs across Western Canadian institutions. They enable comparisons among peer institutions and provide indications of opportunities for collaboration. Another survey conducted in the near future and at regular intervals could report on important milestones achieved among COPPUL institutions. The survey tool should identify the priority of SC interests at COPPUL institutions and provide some high level information for gap analysis.
2. There are other interest groups, within Canada such as the CARL Open Access Working Group (COAWG). Ideally, the COPPUL SCWG should consider working in collaboration with COAWG to conduct surveys, to reduce potential survey fatigue and to gather better data regularly across the country to capitalize on existing frameworks and networks.
3. The COPPUL SCWG should also look at developing targeted surveys or gathering more specific data on COPPUL specific aspects of SC. For example, COAWG subcommittee, lead by Elizabeth Yates at Brock University, is currently investigating the setup of OA author funds at Canadian academic institutions. The topic of author funds was covered in our survey ("Have a fund to pay author fees for OA Journal publishing"), which had 22% of respondents (N=18) indicate they did. Since our survey was completed, Yates has published details of OA funds available at institutions across Canada, with details about several dimensions, including criteria, date established, amount of fund available, and exclusions. See the CARL website for more information:
 - http://www.carl-abrc.ca/uploads/SCC/library_OA_publishing_funds.pdf
 - http://www.carl-abrc.ca/uploads/SCC/OA_funds_EYates_CALJ_May_2014.pdf
 - http://www.carl-abrc.ca/uploads/SCC/CALJ_Canadian_Libraries_OA_funds_EYates.pdf

Ultimately, whatever we do, we need to engage with the practitioners. Not only should we continue to gather information and distribute the information more readily among our COPPUL community and the broader SC community, but we need to form groups that actually achieve

milestones: from improving their own local practice to developing ways to improve the collective practice among COPPUL SC community, promoting greater awareness of the IRs we have (e.g. Figure 4), hosting a shared IR for smaller institutions, and developing and implementing better frameworks and processes.

Conclusion

For getting a sense of our capacity within COPPUL member institutions, the survey has been quite useful and the information gathering has been necessary and practical. It has, at the very least, provided cause for further dialogue and established the groundwork for forming a CoP. The ACRL SC roadshow and the coppul-scholcom list provide further infrastructure for us to build upon.

What is needed now is to create smaller focus groups around areas of interest to engage the SC community within COPPUL. Further, to find the delicate balance, and engage participants to the level that maximizes benefit to them, while minimizing the effort expended by them. To work together to form the vision for each group and to get commitment for the broader vision and a variety of practical deliverables and to keep ourselves accountable to achieve what we set out to do, are all things we need and hope that the new COPPUL SCWG group will take on.

To find the right tension has been difficult; depending on to whom one talks, issues swing from critically important to seemingly innocuous. Some have been compelled by the philosophy of OA for various reasons, but have been resistant to practicing it given the burden or obligations needed to do so. Finding the capacity for some to contribute more requires a greater priority and taking more risk that there will be more gains than losses for the scholarly community in the long run. In terms of finding a need for commitment across the continuum of commitment, the need became more of a compliance obligation recently. Just as this article was being finalized, Minister Holder announced the new OA policy for research with respect to the Tri-Agency (CIHR, NSERC, and SSHRC) funding (Government of Canada, 2015).

Finally, it is incumbent on all of us to make the best of the resources we have available. We must work towards finding a way to promote knowledge mobilization, while expanding the capacity within the COPPUL scholarly community for greater collaboration and engagement.

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Appendix A - Questionnaire

Commented [1]: added the questions from the survey as an appendix

TITLE: Determining the Scholarly Communication Landscape among COPPUL Libraries

The purpose of the survey is to determine what activities in the realm of scholarly communication COPPUL libraries engage in with a view of determining how consortial activity in this regard can be beneficial to all.

1. Name of institution and your contact details
2. Are you the person primarily responsible for directing or coordinating the scholarly communication efforts at your institution? (Yes/No)
3. Is your library currently engaged in the following issues?

Question	Yes	No	No, but planned in the next 12 months
Have held outreach events for faculty on scholarly communication topics			
Have held outreach events for students on scholarly communication topics			
Have held education events for library staff on scholarly communication topics			
Include scholarly communication topics in information literacy instruction sessions for students			
Have a library web presence on scholarly communication topics aimed at campus community			
Have a library web presence on scholarly communication topics aimed at library staff only			
Job descriptions for library staff include scholarly communication duties			
Have assigned library staff members to be responsible for scholarly communication activities			

Have a library committee on scholarly communication that includes library staff only			
Have a library committee on scholarly communication that includes other campus stakeholders (.i.e faculty, editors, university press, research office)			
Offer services, such as copyright, author rights, and/or open access mandates compliance advising			
Have an institutional repository			
Have a fund to pay author fees for open access journal publishing			
Library serves as publisher for new models of scholarly communication (ejournals, etc.)			
Discussions with faculty leadership regarding an open-access resolution for my campus			
Have an interest in open source learning material			

Open ended questions:

4. List here other issues with which your library is engaged with regards to scholarly communication
5. What other means would be helpful to you for increasing your awareness or enabling you to speak about the issues?
6. Do you have an open access policy/mandate/statement at your institution? Please provide details.
7. Do you have a particular strength/initiative/project at your institution related to scholarly communication that you would be interested in taking the lead with for informing/educating other COPPUL institutions about? Please provide details.
8. What role do you see for COPPUL in scholarly communication? Please list the top 3 to 5 things that come to mind.
9. Any other comments you'd care to include?

Appendix B - COPPUL Member Libraries

Athabasca University
Brandon University
Concordia University College of Alberta
King's University College
Kwantlen Polytechnic University
MacEwan University
Mount Royal University
Royal Roads University
Simon Fraser University
Thompson Rivers University
Trinity Western University
University of Alberta
University of British Columbia
University of Calgary
University of Lethbridge
University of Manitoba
University of Northern British Columbia
University of Regina
University of Saskatchewan
University of the Fraser Valley
University of Victoria
University of Winnipeg
Vancouver Island University

Chelsea's comments

Question 3

Some of the results so reflect small vs. large institution issues. I'd recommend seeking out 'mentor' organizations; there are some small institutions, e.g. VIU, who might be good resources for other small institutions who are "not there yet". There should probably be an identifiable 'small-size leader' based on the survey responses.

- Overall the data quality are good; most institutions responded fully without too many missed questions, other than UNBC.
- Support is apparently **not** needed for the following topics, where most institutions responded that they either do it or plan to do it in the next 12 months.
 - Outreach events for faculty
 - Web presence on scholarly communication for campus
 - Offering services, e.g. copyright, author rights,

Support appears to be of the **greatest** need for the following (where 40% or more of respondents responded 'no'):

- Web presence on scholarly communication for library staff
- Outreach events
- Job descriptions for library staff
- Both staff-only and campus-partner library scholarly communication committees
- Author-fee funds

Question 4

Issues that jumped out at me from scanning the results:

- Two institutions not engaged with scholarly communications issues in the past, are now just beginning work in the area.
- IR and data archiving, repositories/management, ETDs (7 respondents)
- OA publishing and journal-related issues (5 respondents)
- Interested in altmetrics / helping faculty measure impact, supporting faculty in relation to SC issues (3 respondents)
- Digitization and funding (2 respondents)
- Copyright services (2 respondents)

Question 5

Overall respondents appear to want a way to see what others are doing in terms of best practices, or practices that work, to be able to share information and to get feedback on ideas or potential projects. Issues that jumped out at me from scanning the results:

- Workshops, and other opportunities for sharing experiences, especially within regions (3 respondent).
- Well-maintained forum for communication about scholarly communications topics, e.g. bulletin board, list, or website (5 respondents).
- Webinars / web events (5 respondents).
- Resource and information-sharing between COPPUL members (3 respondent).
- Messaging about scholarly communication (2 respondents).

Question 6

Most institutions don't appear to have an OA policy, though several are in discussions about such a mandate/policy, etc.

Responses:

Yes: 1

Yes, library only, not campus: 3

No: 10

Not yet but in discussions: 4

No response: 4

Question 7

Few respondents had anything they wanted to share. Of those who did want to share, here are the topics:

- Faculty engagement/university engagement on scholarly communications topics
- IR development (2 respondents)
- Operationalizing scholarly communications into service models
- Establishing a copyright office and service model
- Public Knowledge Project (contact Brian Owen): Open Journal Systems, Open Conference Systems, Open Monograph Press
- Digitization of art materials –
- Copyright
- OJS publishing,
- Digitization and
- Data sharing/archiving.
- Preservation of the scholarly record
- Librarians' motivations for or against teaching students about OA, and
- Means of creating more OA awareness.
- “Journal incubator” (Lethbridge)