

CDL Open Research Information (ORI) Connect: Initial Charge

Introduction

The University of California (UC) California Digital Library (CDL) is committed to advancing open science and scholarship; this commitment is realized in part through CDL's participation and leadership in a multitude of pathways (e.g., services, initiatives, strategies) to achieve a more open and sustainable research and scholarly communication landscape. CDL's efforts to expand open scholarship are successful because we pursue a continuum of collaborative opportunities (i.e., at the local, regional, national and international levels) and partner deeply with library colleagues, faculty, researchers, administrators and like-minded organizations.

Inspired by [the Barcelona Declaration on Open Research Information](#), CDL will consider the ways in which closed research information currently underpins our work, including key open scholarship efforts, and how CDL and others can transition to and support open research information (ORI).¹ The CDL ORI Connect ("the Connect Group") is charged to carry-out an initial landscape analysis (see scope below) and advance recommended next steps. The analysis and recommendations will inform CDL's goal to further adopt and advance ORI, and commitment to reflect on and share CDL's journey in pursuing open scholarship, including the challenges we are grappling with.

Charge and core responsibilities

CDL already makes openness the default for the research and scholarly communication outputs that we support, use and produce. Additionally, CDL leadership and experts are united in our shared desire to work with and transition to services, systems and infrastructure that utilize and contribute to ORI. We believe expansion and adoption of ORI can be attainable and actionable for a variety of research institutions, including UC, and that multiple business models – institution-led, non-profit and commercial – will ensure a sustainable landscape. To test these baseline assumptions and support CDL's goal to adopt and support more ORI practices, the Connect Group is charged to carry out a landscape analysis that will inform CDL next steps, including further CDL consultation, collaboration, strategy and decision-making.

This landscape analysis should research and document:

- A. Current and potential CDL use of research information services, systems and related infrastructure, both open and closed;
 - Including how research information products are currently deployed at CDL (their impact, how they shape CDL services) and where and how these CDL services intersect with campus services (i.e., the impact of our use of the research information products/initiatives on the campuses);

¹ Open research information (ORI), [as defined in the Barcelona Declaration](#), is "research information that is free to access and free of restrictions on reuse. Openness of research information is a spectrum, not an absolute. Just like research data should ideally adhere to the [FAIR principles for Findability, Accessibility, Interoperability, and Reusability](#), open research information should ideally also follow these principles. If the highest levels of Findability, Accessibility, Interoperability, and Reusability are realized, research information is both open and FAIR."

- Including high-priority potential opportunities and needs (i.e., not yet being pursued by CDL), related to business intelligence, decision making, service provision and storytelling (i.e., describing the impact of UC and CDL's work);
- B. CDL activities that contribute to the ORI landscape (e.g., ROR) and the extent to which CDL already invests in ORI;
- C. Current and emerging ORI services, systems and infrastructure (the ORI landscape), including initial assessment of:
 - What these existing ORI initiatives/products are and how they align with and advance CDL's open scholarship goals;
 - The extent to which these ORI initiatives/products can support existing CDL commitments (e.g., to facilitate implementation of our open access policies, to carry out publishing analyses for transformative agreement negotiations, etc.);
 - The gaps and development needs for these ORI initiatives/products, for CDL adoption. This is an initial identification of gaps and development needs, to inform decision-making and next steps regarding deeper analyses and/or potential partnerships to begin exploring.

Based on the landscape analysis, the Connect Group will suggest ORI priorities for CDL, including:

- D. Identification of opportunities for CDL adoption of ORI initiatives/products, including where a development partnership could be pursued in service of UC as well as the broader community.

While this is initially a CDL-based analysis, the findings generated under this first charge could also be shared with UC Libraries colleagues, as well as the open scholarship and ORI community. As noted above, this landscape analysis and recommended ORI priorities and opportunities will inform CDL strategy, decision-making and communications.

Timeline

The work of the Connect Group is anticipated to take upwards of four months and represent a 0.1 FTE time commitment, per participant. If during the course of this work, the Connect Group believes the charge will require more time - they should propose a revised timeline to the CDL Directors Cabinet.

Reporting line

The Connect Group is charged by CDL AVP/ED Günter Waibel and will report to the CDL Directors Cabinet, engaging cabinet for feedback and consultation - as needed.

Membership

The Connect Group will consist of 5-6 members and will include experts from the CDL programmatic areas and a member of the systemwide library planning team for project management and analytics support. A member of the CDL Directors Cabinet will also serve on the Connect Group.