

# Terms of Reference for ORWG Task Groups

May 2020

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## Task Group for OpenAIRE

### Introduction:

In January 2018, CARL was named as a participating partner in OpenAIRE Advance, a three-year project funded by the European Commission, which involves an activity to expand and enhance OpenAIRE services beyond Europe. For CARL, this project is an opportunity to demonstrate to the broader community the role and value of repositories in supporting open access, since currently the Tri-Agencies do not include Canadian institutional repositories in their methods for monitoring compliance with the open access policy.

OpenAIRE is building a global knowledge graph that can be used to analyse and track research publications. The CARL-COAR-OpenAIRE collaboration will involve OpenAIRE aggregation of numerous data sources, including Canadian repositories, and provision of a discovery portal for Canadian research outputs affiliated with the Canadian Tri-agencies to track publications, data and other research outputs. The portal will bring information and data from many international sources, including Crossref, Unpaywall, and thousands of journals and repositories from around the world. In addition to the original CARL-COAR-OpenAIRE project objectives, the ORWG has identified an opportunity for Canadian repositories to use OpenAIRE's repository statistics tracking service, which would enable standardized and comparable usage statistics across Canadian repositories. Once the pilot "aggregator as a service" is up and running, CARL and other stakeholders can assess the value of this approach for tracking Canadian research outputs and consider whether there is interest in launching and maintaining such a service in Canada or continue to use the OpenAIRE services (likely for a fee).

### Mandate and Role:

Under the auspices of the CARL Open Access Working Group (ORWG) and the Advancing Research Committee, the Task Group for OpenAIRE is tasked with managing Canada's participation in the OpenAIRE Advance project, which involves Canadian compliance with OpenAIRE metadata guidelines, developing an authority list of references for the Canadian funders, and liaising with the Tri-agencies, as well as supporting the implementation of requirements in Canadian repositories to comply with OpenAIRE's repository statistics tracking service.

### Responsibilities:

- Provide support for the adoption of OpenAIRE guidelines 4.0 in the different repository platforms in use in Canada (firstly by concluding the work of the initial implementation group, then by inviting participation by remaining Canadian repositories);
- Liaise with OpenAIRE to ensure compliance with other requirements for Canada's participation in the project;
- With CARL staff, engage with Tri-Agencies to assess value of this service from the funders' perspective;

- Provide support for Canadian repositories to participate in the repository statistics tracking service

**Activities:**

- With support from the Task Group on Community Building and Engagement, continue communicating with Canadian institutions regarding the projects and benefits to participation;
- With initial implementation group, document and share lessons learned for implementing guidelines 4.0;
- With input from the Tri-agencies, prepare an authority list of names for Canadian funders;
- Engage with OpenAIRE on issues or problems that occur in implementation;
- Define and share the requirements for participation in OpenAIRE repository statistics service.

**Membership:**

Pierre Lasou (lead)  
 Geoff Harder  
 Yoo Young Lee  
 Courtney Matthews  
 Tomasz Neugebauer  
 Gabriela Mircea  
 Kathleen Shearer  
 Andrea Szwajcer  
 Kelly Stathis (representing Portage)  
 Mita Williams

The task group lead will be responsible for setting meetings of the task group, chairing these meetings, keeping the group on-task, and liaising with the ORWG (which could include leading discussions on areas that overlap with other task groups and the overall working group’s efforts.

## **Task Group for Community Building & Engagement**

**Introduction:**

To achieve a more cohesive national approach for repositories in Canada, a strong community of repository managers and practitioners is essential. Community building will help to coalesce the geographically dispersed repository network around a common vision and objectives. In addition, a community of practice will allow the Canadian network of repositories to progress more rapidly through exchange of best practices and shared problem-solving.

**Mandate and Role:**

Under the auspices of the CARL Open Access Working Group (ORWG) and the Advancing Research Committee, the Task Group for Community Building & Awareness Raising will be responsible for strengthening the Canadian repository community through ongoing engagement and information sharing among those building and providing services in support of repositories, as well as developing outward-looking communications to promote the role of repositories as important national infrastructure. The repository community is very diverse. Repositories are at various stages of technical

and service maturity; may differ in their objectives and scope; and there are a number of different roles that support this important work, e.g. service managers, systems and development staff, metadata, administrators, and scholarly communications librarians. This group will work to bring greater interaction and cohesion across the Canadian repository community.

**Responsibilities:**

- Prepare communications that articulate the role of a network of Canadian repositories.
- Gather and disseminate strategic information to/from the repository community to advance specific projects that will enhance repository programs in Canada, including communications and consultations relating to ORWG projects;
- Develop an understanding of the differences in needs and experiences of repository teams and service providers across differing regions and institution sizes in order to recommend how the network might be strengthened and cohesive services across Canada might be further enhanced;

**Activities:**

- Deliver quarterly written updates on ORWG activities to the rest of the Canadian repository community (to be posted to the CARL website, and promoted via the Scholcomm in Canada Slack channel, REPOS-L list, and Advancing Research Committee list);
- Organize information-sharing webinars for the repository community on behalf of the ORWG or in collaboration with specific ORWG task groups;
- Prepare talking points and the rationale for the role of a network of repositories in Canada that can be used in different communities (library administrators, researchers, funders, universities, the public);
- Building on work initiated during the ORWG's first mandate, prepare a white paper that outlines the needs of IR manager and the practitioner community in terms of local, regional, and national support in order to strengthen the national network of repositories;
- Continue to expand the number of users of the Slack channel and use it to engage with repo managers.

**Membership:**

Jessica Lange (lead)

Talia Chung

Jordan Hale

Dana McFarland

Karen Meijer-Kline

Mike Nason

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## **Task Group on Mapping the Repository Landscape in Canada**

### **Introduction:**

The current landscape in Canada for repositories and related services is fragmented, having evolved organically over many years. There are numerous types of repositories (institutional, data, domain, etc.), different layers of services that interact with repositories and have different functions and objectives (discovery, preservation, research information services, and so on) and these are all managed and funded by many different types of organizations and stakeholder communities. In order to ensure that we are developing an efficient and coherent national approach to open scholarship, with no significant gaps, the community needs to have a better understanding of the current landscape.

### **Mandate and Role:**

Under the auspices of the CARL Open Access Working Group (ORWG) and the Advancing Research Committee, the Task Group on Mapping the Repository Landscape in Canada will aim to map the current landscape of repositories and related services (e.g. discovery and preservation services), explore the complex relationships between the different services, and identify gaps and opportunities for alignment and cooperation in regards to infrastructure, technology, and services.

### **Responsibilities:**

- Define value-added service layers for Canadian repositories, identify priorities, and launch pilot projects to demonstrate services;
- Consider and clarify the relationship between different repository types in Canada (e.g. articles, data, etc.), in collaboration with other initiatives such as Portage;
- Investigate the potential for and interest in shared repository infrastructure, service delivery and support;
- Support the community in adopting the technologies, standards and protocols that support new services (e.g. COAR next generation repository recommendations).

### **Activities:**

- Maintain a census of existing repositories and value-added services that interact with repositories (e.g. aggregators);
- Investigate existing shared repository models (in Canada and beyond) and assess community interest in this approach at the regional or national level;
- Produce a white paper that presents findings regarding shared repository models and describes possible opportunities for consideration in Canada.

### **Membership:**

Craig Harkeman (lead)

Corey Davis (CARL VPO for Digital Preservation)

Patrick Gamsby

Geoff Harder

Andrea Kosavic

Lindsey MacCallum

Veronica Ramshaw

Tim Ribaric

Will Kirk Roy

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