Creating an IR: Planning and Policies

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NITLE
DSpace Virtual User Community Meeting
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Creating an IR: Policies

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Why Make Policies?

- Clarify
- Justify
- Establish guidelines
- Plan procedures
- Ensure efficiency
- Time management
- Diversify workload
- Get input and create “buzz”
Kalamazoo College Policies

http://dspace.nitle.org/handle/10090/104

...help yourself!
Questions to Answer in a Policy Document - 1

- Why do we need a policy document?
- What does this document do?
- Who will write this document?
- Who will revise this document? How often?
Questions to Answer in a Policy Document - 2

- How will Sub-Communities and Collections be made? By whom?
- Who can deposit materials?
- Whose stuff can be in there?
- What kind of stuff can be in there?
Questions to Answer in a Policy Document - 3

- What are our guidelines for preservation and access? What are our strategies?

- What are our guidelines for withdrawal?

- What are our copyright guidelines?
Questions to Answer in a Policy Document - 4

- What is the workflow for:
  - Submission?
  - Cataloging?

- What file formats will we support?

- To what file size should we limit submissions?
Questions to Answer in a Policy Document - 5

- What are our privacy and confidentiality guidelines? (Especially for student work)

- What is our process for getting authors to sign/commit to our license agreement?

- How will our institutional repository be organized? (What are others doing?)
People to Involve

- College Archivist
- Information Technology or graphics staff
- Cataloger
- Dean of Students
- Administrative Assistants
- Faculty
Creating an IR: Planning

Christopher Raab
Archives and Special Collections Librarian
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Planning - New to DSpace?

- **www.DSpace.org:** Left-hand column - New to DSpace? Select “Getting Started” for planning documents and tools
- **Project Plan:** Sample DSpace Project Plan contains useful project planning timeline

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<thead>
<tr>
<th>Project Planning Timeline</th>
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<tr>
<td>Define service definition</td>
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<td>Assemble a team</td>
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<td>Choose technology</td>
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<td>Early Adopter programme</td>
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<td>Marketing the service</td>
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<td>Launch events</td>
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<td>Run the service</td>
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Planning - New to DSpace? Cont.

- **Communications Plan:** Sample Communications Plan identifies ongoing communication activities and launch date event activities
- **Marketing Your Service:** Provides useful marketing approaches and ideas
  - Top-Down Approach
  - Bottom-Up Approach
  - Create Some Buzz
  - Keep in Touch with Communities
- **LEADIRS Workbook:** 134 p. workbook (.pdf) provides many useful advices on creating and marketing an institutional repository
Overview of F&M DSpace

- **Name:** F&M instance named Scholars Square (SS)
- **Input:** F&M Library currently submitting all items
- **Official Launch:** February 7, 2008
- **Human Resources:** Two Archives & Special Collections staff plus two Library School interns Pitt (Fall 2007) and UW Milwaukee (Spring 2008)
- **Budget:** SS absorbed into Digital Preservation Line
- **Structure:** SS currently stands at 4 Sub-Communities, 7 Collections (750 objects)
- **Content:** Student Honors Theses, Manuscript Objects, Visual Resource Objects, Faculty and Professional Staff Scholarship
Planning & Marketing
Scholars Square

- **Policies:** Modified Kalamazoo’s Policies Document (reviewed by College Librarian and passed by the Faculty Library Committee)
- **Literature:** Modified sample Tri-fold Brochure (.doc) and PowerPoint (.ppt) from Dspace wiki
- **Web:** Created SS Web Page to headquarter information and FAQs; Link from main Library web page under “Collections”
- **Verbal:** Modified sample Elevator Pitch from Dspace wiki; reviewed SS with all librarians
- **Advice:** Followed many of the “Marketing Approaches and Ideas” from www.Dspace.org
Planning & Marketing
Scholars Square Cont.

- **Launch Event:** SS campus-wide launch coincided with library’s Celebrating Scholarship Exhibition reception, February 7, 2008
  - Distributed brochures; Two laptop “stations” to demonstrate searching and “support” pages
  - Highlighted (and thanked) “charter participants”; showed examples of faculty scholarship
  - Remarks by Provost; “Scholars Square” M&Ms

- **Press:** Conducted interview with F&M *College Reporter* newspaper - included faculty testimonials

- **Person-to-Person:** Made SS focal point of spring semester “Librarian House Calls” series
Planning/Marketing Must-Dos

- **Start** by formulating a “Project Plan”
- **Create** all promotional materials early - print brochures, web pages/links, Power Points, etc.
- **Solicit** faculty “Charter Participants” to build departmental scholarship collections
- **Plan** a “Campus-wide Launch” event or reception
- **Construct** a “Submissions Instruction Handout” for faculty covering file formats, copyright, citation information, keywords, and number of files
- **Involve** the Provost’s Office and Instructional Tech.
- **Visit** other DSpace instances to gather ideas
- **Consult** “Lessons Learned” from DSpace wiki*
Questions/Contact Information

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