

# Notes from CIARD Pathways Writeshop

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## ***Participants***

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## ***Aim***

The aim of the Writeshop was to consolidate the existing work on the Pathways documents, to gather feedback from recent consultations in Egypt and Columbia and adjust materials accordingly, and to identify new materials which needed to be written and revise the work schedule accordingly.

The points of discussion over the morning of the first day covered:

- Concepts
- Website Changes
- Pathways
- New materials
- Forthcoming meetings

## **Day 1**

### ***Concepts***

Cross cutting issues have arisen from recent consultations in Near East Region, Cairo meeting and CG meetings in Columbia.

### **Key interests in the feedback from Columbia**

These included:

Discussion focused on availability and accessibility.

Detailed discussion of rights (IP) to materials, particularly by librarians, and looking at the use of Creative Commons rather than copyright.

Repositories – interest in development by theme as much as by institution.  
Pathway documents should be simple (direct) and brief.

## **Individuals**

To generate buy-in and acceptance materials should be targeted also at individuals.  
Ensure individuals can engage in the activities and concepts proposed.  
Individual commitment is important at all levels e.g. CIAT director – acceptance from senior levels is necessary. Scientists/researchers often do not have an institutional focus.

## **Tangible outputs**

CIARD needs to produce tangible outputs. The benefits of the programme need to be seen now.

The Checklist is nearly complete. Ensure individual readiness is captured. Try to capture general approach to ‘research outputs and related data’ rather than documents.

(PE to redraft).

ARD Webring to be focus of development for outreach at this stage. A business plan needs to be developed.

CMTF discussions suggested a repository approach prioritized documents before data. Showing work in progress to our user base is now necessary to ensure that the programme is built with the input of others.

Current English language versions should be used for input. Translation comes later in the process. Other languages will raise other semantic issues. Spanish is essential.

French. Then Arabic, Chinese?

The question was raised as to whether translation should be a Pathway in itself? Or just part of repackaging?

Some sample Pathways should be available for the Science Forum at WUR in June. (PE)

## **Key interests in the feedback from Cairo**

### **Membership**

It was suggested that CIARD is open to all organizations - both users of information as well as owners of data.

The feedback from the Cairo meeting wanted to know who is behind CIARD - the logos on the site need to be clearer. (SR)

### **Quality**

No standard of content quality is claimed by CIARD.

CIARD does however indicate the quality of interoperability. ARD Webring will link to all services, so this is a first step. The Directory can indicate which services are at which level.

Suggestion was that a reference to content quality needs to be made.

Benchmarking in the Webring registry is required – standards, in services.

## **Cultural**

Ownership and rights and conditions may not be understood by all. The Pathways are not prescriptive, but illustrate the value of openness.

CIAT will move to a Creative Commons licence - keeping essential rights in publications.

Scientific data is often more difficult to share than publications.

## **Support to Influence**

GFAR can support CIARD to help with influence at higher levels – at the administrative and national levels for research centres.

A postcard-sized PR piece is needed aimed at researchers.

## ***Changes to the CIARD website***

### **Identity - Who is behind CIARD?**

Main brochure has it on the back.

Manifesto has it on the back.

On website it is not so clear.

### **Registration page**

CIARD – join initiative.

Service registration – on Webring.

Registration of Organisation.

Ask for individual to be registrant and contact?

### **Content changes**

*Links* to the webring.

*Links* to the history.

*Benefits and value addition.* These should be more clearly communicated in the open letter.

*Language:* Additional languages material will eventually be available on website.

*New section:* Add **FAQ**, e.g. CIARD is not a database or information system requiring input.

*Support:* Helpline - CIARD Helpdesk [information@ciard.net](mailto:information@ciard.net) – VP has access. Need to develop workflow. Needs to be resourced adequately.

*Strategies and Activities list from CIARD partners:* Strategic threads, awareness level not necessarily technical. Statements from partners and events.

*Benefits* of joining need to be highlighted on site.

## **Webring**

Webring becomes a registry of institutional resources and services – for all involved.

## **Open development**

After initial writing Pathways need to be developed collaboratively - make more accessible on the wiki.

Need to attract individual and institutional champions to drive the programme forward.

All partners should put onto the site all the activities they're involved in (strategic and practical) which will help new partners – like the CTA approach.

Generally, openness is our starting point, but we show options so people aren't forced to be completely open – as in Creative Commons, you choose how open you want to be.

We need to spell out Acronyms and we also need explanations for some people.

## **Pathways**

### **Clustering**

Introductions for different audiences could lead to clusters of pathways.

Suggestion that there should be a decision tree online.

### **Format of Pathways**

Agreed that the printed copy should be 2 pages - and a better visual presentation.

Essential to point to thorough references.

Approach pitched between IMARK lesson and guidance note.

Print and web formats will be available.

The proposal was made to produce a separate list of issues vs Pathways - the issues documents would contain more focused information than a Pathway. For example these could include detailed technical steps.

The group wanted the Pathways to be simple and brief.

Where users, like the IT unit and librarians, want more detail i.e. on Creative Commons, there would be linked resources on the web.

There needs to be a more chatty introductory piece – particularly for scientists who may be working as individuals.

There needs to be more motivational emphasis in the introductions to the pathways.

## **New materials**

**Meeting materials:** Poster on Pathways, Documents, Postcard on CIARD for researchers.

**Tools lists:** Directory showing lessons learnt and examples matching tools to need. Complementary to KS toolkit.

**New product:** Map the product so that users can find their way to relevant materials.

**Advocacy:** Much good advice available. Repository Support Project website gives guidance on this. CG has achieved this by their AAA initiative focusing on managers with the message that their output is not being read. The IMARK training series has a module on this and CTA workshops are being run on IM strategies (Namibia and Fiji).

## ***Meetings for CIARD promotion***

June 15, 2009 – Wageningen. CGIAR Science Council: Scientific forum 2009.

2009 – Peru. XV Reunion Interamericana de Bibliotecarios y Documentalistas Agrícolas (RIBDA).

13-17 July 2009 - Accra, Ghana. 2nd IAALD Africa Chapter Conference.

April 2010 - AGNIC meeting.

May 9-12, 2010 2010 USAIN Conference. Hosted by Purdue University, West Lafayette, Indiana, USA.

28 March to 1 April, 2010 Global Conference on ARD, Montpellier.

## **DAY 2**

Present: EP, MA, MG, HB, CA, PE, (SR by phone)

## **Introduction**

We reviewed the results of the first day, clustered the Pathways, and planned next steps:

- a) Definition of 4 user types/roles
- b) Clustering of three types of intervention
- c) New materials to be produced
- d) Schedule of authoring
- e) Workflow process

## ***Definition of user types/roles***

We looked through the existing Pathways and identified user types for the materials. This resulted in 4 user groups:

- **Senior Managers** – responsible for strategy and policy or decision makers affecting the adoption of a CIARD approach.
- **Implementers** – Information managers, Librarians, IT staff who would take actions to work on systems putting the strategy in place.
- **Researchers** – As individuals who would take an interest in ensuring that their research and outputs were more available, accessible and applicable.
- **Communications and Marketing** – Those responsible for publicizing, promoting and disseminating research outputs.

It was discussed that in reality one individual might have more than one of these roles but that there needed to be an introduction for each user type to the Pathways which might be

relevant to them, and that Pathways needed to be composed with one or several of these particular audiences in mind.

### ***Clustering of types of intervention***

In view of the current Pathways in preparation a clustering of similar Pathways was made which resulted in three types of intervention.

- **General** Strategic and Policy issues – those organizational issues which need to be addressed in handling research outputs.
- The **Capture Collection and Curation (CCC)** of research outputs – Ensuring that all the outputs are described in a form that makes them available.
- Managing **Web Presence** – Using the internet to make the information accessible to others.

### ***New materials to be produced***

The following products were identified as possible ways to introduce users to the Pathways:

- **User Introductions** – Explaining which of the Pathways are relevant to each user type in a narrative following their interests and priorities.
- **Intervention Introductions** – These would take an overall function in an organization and show the pathways which might be relevant at particular stages. For example the use of the web by an organization to make their outputs accessible as well as available.
- **Decision tree** - As a future interface to the materials an online interactive decision tree was suggested (EP). Users enter and are asked questions to guide them through example materials.
- **Presentation of CIARD** – In lunchtime discussions the introduction of the concept to organizations was discussed. It might be worth considering updating existing CIARD presentations and putting them online linked from the website.

### ***Workflow process-Next steps***

The immediate workflow was suggested as follows:

1. Update of web platform with new content – Wiki. (All/VP)
2. Partners encouraged to send relevant content to authors.
3. Authors to share drafts as early as possible on wiki according to schedule.
4. PE to edit final drafts.
5. Encourage review of materials by CIARD group and others.

### **Schedule of authoring**

This timetable was primarily driven by the need to have some materials in place by the Science Forum in Wageningen (15 June) for a research audience.

**See in Appendix document a full table of revised Pathways organization, responsibilities and timetables, with comments.**

<b>Pathway</b>	<b>Week 1</b>	<b>Week 2</b>	<b>Week 3</b>	<b>Week 4</b>	<b>Week 5</b>	<b>Week 6</b>	<b>Week 7</b>
<b>A General</b>	PE (Intro)						
<b>1 Advocate benefits</b>	PE						
<b>2 Work with OA Publishers</b>	PE						
<b>3 Rights Policy</b>	PE/PB						
<b>4 Global services</b>		PE					
<b>B CCC</b>						PE (Intro)	
<b>5 Institutional policies</b>		HB/PE					
<b>6 Building</b>		HB					
<b>7 Born Again</b>					PE		
<b>8 Broken Links</b>				HB			
<b>9 Preservation</b>							n/a
<b>10 Standards</b>							HB/PE
<b>C Web Presence</b>						PE (Intro)	
<b>11 Sitemaps</b>					CA/HB		
<b>12 SEO</b>						CA/HB	
<b>13 Web2 for site</b>				MA			
<b>14 Social Media</b>				MA			
<b>15 Web video</b>				MA			
<b>16 Newsfeeds</b>					CA/HB		
<b>17 Analysis</b>					MA		
<b>18 Cross search</b>			CA/HB				
<b>19 Get outputs out</b>					HB/JK		



## CIARD Pathways Writeshop - Appendix

Status: 29 May 2009

**'User' key:**

**M = management/policy**

**I = implementer**

**R = researcher**

**C = communicator/marketer**

Pathway	Functional group	Author	Status	Delivery	'User'	Comments
<b>A</b>	<b>General – aimed at Senior Managers and Directors</b>					
0	Introduction	PE		05/06	All	Aim at researchers for Science Forum
1	Advocate the benefits of the digital accessibility of content	PE	Draft	05/06	All	To include some back-digitization
2	Work with publishers who have flexible policies on open access	PE	Draft	05/06	R, I	
3	Develop an institutional rights policy and guidelines for Open Access	PE	Draft	05/06	M, I	Check legal aspects w. PB
4	Make content available through global services like AGORA, TEEAL, OARE and Google Books	PE		12/06	M, R, I	MG to supply content on Google Books to PE
<b>B</b>	<b>Repository – collection, capture and curation of outputs</b>					
0	Introduction	PE		10/07	All	
5	Put in place institutional policies that enable the sustainable development of a repository	HB/PE	Draft	12/06	M, I	Some to be absorbed by A1. 5 to be more specific for implementers
6	Building an institutional or thematic repository	HB	Draft	12/06	I	Examples need to be shortened. More examples to be added over time. Includes AGRIS-AP and Thesauri as Issues
7	Digitize older outputs, to be 'born again' digital	JC/PE	Draft	03/07	I	Needs reference to Google Books
8	Broken links	HB		26/06	I	
9	Issues of preservation of documents and data	n/a		17/07	I	Need an author

10	Standards – GIS and BIO INFORM	HB/PE		17/07	M, I	Victor Myakawa to provide BIO INFORM and GIS?
<b>C</b>	<b>Web Presence – making content as widely accessible as possible</b>					
0	Introduction	PE		10/07	All	
11	Making your repository accessible: (Registration of repositories, Sitemaps, RSS Feeds)	CA/HB		03/07	I	
12	Optimize the content and structure of your website for search	CA/HB		10/07	I	
13	Using Web 2.0 solutions for your Website. Why, how and which?	MA		26/06	R, C	MA to supply from Web2forDev
14	Beyond articles and reports: try out 'social' media	MA		26/06	R, C	-ditto-
15	Beyond articles and reports: video	MA		26/06	R, C	-ditto-
16	Publish and promote outputs with newsfeeds	CA/HB		03/07	R, C	
17	Analyse how your IR/websites are being used. Put this knowledge to use	MA/MG		03/07	I, C	Content from CG Management Issues on website. Some to be included in Pathway1
18	Set up added value services that query across platforms	CA/HB	Draft	19/06	I	
19	Getting your outputs out – AGRIS, CABI, Google Scholar	HB/JK		03/07	M, I, C	
	<b>Phase 2</b>					
1	Make content accessible across web, email, phone, and radio					
2	Repackage research outputs to make them more 'usable' by other stakeholders	TE	Draft			
3	Communicate research messages to the mainstream and specialist media and other 'users'	JC	Draft			
4	Communicate research messages for web, email, and phone					
5	Engage with partners to enhance communication with other stakeholder groups	TE	Draft			