

# Bringing the *manu* | *birds* together: The Open Access Critical Friends Rōpū as a model for nationwide connection & collaboration

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**Abstract:** Globally, openly accessible research is growing exponentially. However, Aotearoa New Zealand (AoNZ) still has one of the lowest national open access rates, sitting at approximately 40% open. In 2023, Te Pōkai Tara (Universities New Zealand) released a statement committing to drive and support open access across the University sector. The goal, to raise the national percentage of open research to 70% by 2025.

To support this initiative, the Council of Aotearoa New Zealand University Librarians (CONZUL) sponsored a project to produce a resource to guide New Zealand's researchers through the open access publishing process. To ensure nationwide relevance, ten librarians from AoNZ's eight universities formed the Open Access Critical Friends Rōpu. Together they produced the Open Access Toolkit for Aotearoa New Zealand Researchers.

During this presentation, project team members will share their journey and learnings including strategies that libraries can use to connect and collaborate on large-scale projects. Whilst the toolkit was the major output of the project, success hinged on the whanaungatanga (relationships) and manaakitanga (respect) established amongst the rōpū (group) over the course of the ten-month project. This created an environment where members felt safe sharing knowledge and resources. Goals were set together and honesty encouraged. Inclusion was paramount and included using online tools that were accessible to all. Each member's workload capacity and preferred roles were taken into consideration. The project concluded with individual and group reflection on project successes and lessons learned.

**Keywords:** Open Access, Aotearoa, New Zealand, academic libraries, collaboration



## Speaker notes:

### **Local context: Aotearoa New Zealand (slide 2)**

While New Zealand has a history of strong library COPs, there's been more groundswell recently outside of the library community that signifies a broader awareness of and desire to move toward OA.

Here you can see four key recent drivers of the OA movement in Aotearoa NZ.

### **Literature review themes (slide 3)**

In preparing for this presentation, we thought perhaps we should do a lit review...so we did, and turns out that what we did aligns really nicely with the literature. Here are some of the key themes that came across from the literature:

1) Collaboration is key: libraries have a professional & cultural tradition of collaboration & information sharing, as evidenced by our extensive & inter-related networks from international (ILFA, OCLC) right down to local listservs and COIs. Successful governance is due to a 'willingness by libraries to share intellectual effort for the greater good of libraries' (Saunders & Corning, 2020; Pace & Storey, 2018)

Underpinned by the core library values of equity, neutrality & service (Coombs et al., 2017)

2) Communication helps to articulate the reason for undertaking the work, engaging others, and communicate with audiences; flexibility is required to succeed (NZ authors)

3) We also found an excellent framework from Saunders & Corning that outlined seven keys to successful collaboration. These are:

1. Diagnostics & planning
2. Alignment
3. Roles & responsibilities
4. Assessment
5. Project management
6. Barriers
7. Enablers

Turns out we did all of these things over the course of our project, which we feel lends weight to the framework. Throughout the presentation, we'll highlight the synergy between these seven keys and our Toolkit project.

### **Challenges & Solutions (slide 5)**

Geographical distance - we made sure to build in time for *whakawhanaungatanga* at the start of the project as well as in every meeting.

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*Whanaungatanga* is a core concept in Te Ao Māori - *whanaungatanga* is about relationship, kinship and a sense of family connection. It is created through shared experiences and working together and provides people with a sense of belonging.

*Whakawhanaungatanga* refers to the action of fostering whanaungatanga | connections & relationships among people.

Berit: This was quite an important priority for me, as I was leading the project and didn't know anyone on the project team aside from Donna (I've only been working in academic libraries for about 3 years). I purposefully worked to build relationships and connections with my team from the outset, and we always held space for this at the start of every meeting as well.

Donna: my role is a Scholarly Communications specialist and this project was perfectly aligned with my role. I've been working in scholarly communications for 8 years and I am very well embedded in the COPs - I was excited to the project because not only was it aligned with my professional interests, I already knew most of the team from COPs and COIs.

### **Miro Snapshots (slide 6)**

This is a snapshot from the Miro board that we used throughout the project, both to plan and to collaborate in real time.

This snapshot shows one of the first activities we did as a rōpū - an environmental scan. We compiled the types of support services available at each university, and we looked at what was & wasn't working well in the OA space for everyone as well. Everyone put their notes up on the board during the meeting, and then Berit went back in afterward and identified themes to address moving forward.

This process relates to four of Saunders & Corning's keys:

- Assessment & alignment: We assessed & compared what resources we all had.
- Diagnostics & planning: We diagnosed existing issues and then planned how to design something that would \*actually\* work for all of us (e.g. why design a workshop when only half of us only had capacity to offer one?).
- Identifying potential barriers: This is when we realised that interactive module was probably out of the question, since we couldn't build something that would be compatible across all our platforms.

### **Miro snapshot 2 (slide 7)**

This was the follow-on activity from the previous slide, where we dived deeper to identify which OA-related knowledge gaps were present in our university researchers.

The post-its with multiple coloured tags show issues that were common across multiple universities - someone would add a concept or idea, and then others would add their tags if they were facing the same issues.

This step relates to the same four keys:

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- assessment & alignment
- diagnostics & planning
- identifying barriers to OA usage

Both of the activities shown here helped reinforce the common challenges and barriers we are all facing at our universities. This helped shape the project and ensure we were addressing the existing problems & knowledge gaps our researchers had. We had clear \*alignment\* - we were all working toward a common goal to solve issues that were present across the board at all institutions.

### Miro snapshot 3 (slide 8)

After the project concluded, we had a hui | meeting to discuss what went well, what we could do better next time, and what future recommendations we had for Universities New Zealand. This image shows the things the rōpū felt worked well throughout the project, and there is clear alignment here with all seven keys.

- Diagnostics & planning: Underpins all of these, really. This related to project management & comms, environmental scanning, planning the meetings, and more.
- Alignment & assessment: as Donna mentioned before, the environmental scan was a big part of making sure what we did was relevant for everyone in the rōpū.
- Roles & responsibilities: As I've already mentioned, everyone appreciated being offered a variety of roles within the project, allowing everyone to contribute within their capacity.
- Project management: There's clear alignment here with the topics on the board – the team especially appreciated that having someone accountable for organising & planning the meetings, planning the timeframes, reporting back to sponsors, maintaining momentum and meeting the deadlines meant that they didn't need to worry about it.
- Barriers: Everyone greatly appreciated being able to share knowledge and resources amongst the rōpū irrespective of institution.
- Enablers: Our key enablers here were our digital platforms Miro & Canva, and also the established connections between rōpū members and links to the existing communities of practice.

### The Open Access Toolkit (slide 9)

The [Open Access Toolkit for Aotearoa New Zealand Researchers](#) is hosted on the [Open Access Australasia](#) website. It covers the following publishing stages:

- Planning your research
- Choosing a journal
- Submitting your manuscript
- On acceptance
- After publication

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There are multiple versions available. The first is an institution-neutral version, usable by any researcher from any institution. This toolkit is available in graphic and accessible formats.

The second version is a set of free templates that anyone can take and adapt for their own context. Again, templates for graphic and accessible versions are available for free download, adaptation and reuse. In the template versions, all red content indicates placeholder content that you can replace with links to your own support teams and resources.

We feel this is a great example of a collaboration where both sides gain benefit - OAA is an established, reputable organisation with wide reach & impact, and the OA Toolkit has brought additional attention & traffic to OAA & other resources.

### **Open Access Toolkit examples & adaptations (slide 10)**

Here are two examples of how different universities have adapted the template to suit their own contexts by changing the design & colours, adding branding, inserting unique support & resource links, etc.

The left example is from Te Whare Wānanga o Waikato | University of Waikato. They have done a beautiful job of changing the layout, colours and design of the toolkit. They have largely kept the original text, but customised the links to their own support teams and resources.

The second example is from Charles Sturt University. You can see this version is much closer to the original; however, the branding in the top corner has been added, and the more New Zealand-specific aspects of the design (the birds) have been removed for the Australian context. They have customised the text and links with their own institutional resources.

### **Adapting what we did for your own context (slide 11)**

Remember Saunders & Corning's (2020) Seven keys to successful collaboration:

1. Who is aligned with you? Take the time to find the right collaborator and to ensure that your end goal is the same. Let's be honest - New Zealand is quite small in comparison to most countries - just because we collaborated on a national scale does NOT mean this is the right choice for you. Think about who has a similar context to you and if a collaboration would make sense.
2. Design as far as you are aligned - but leave room for customisation. You are unlikely to be able to fully design the perfect one-size-fits-all resource - our contexts are too complicated for that. (In order to do this, you need to know where you are aligned and where you diverge.)

### **Adapting what we did for your own context, cont'd (slide 12)**

3. It was crucial to have someone designated as leader because otherwise someone would have had to volunteer to do this on top of an already busy day job, which would have been a recipe for disaster.

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4. The team really appreciated being able to contribute in different ways - they felt we were able to take unique contexts into account and there wasn't pressure to give more than they could offer.

### **Adapting what we did for your own context, cont'd (slide 13)**

5. This relates to removing barriers where possible. Every NZ University is competing for students; however, CONZUL set that aside in order to collectively work toward the greater good of opening access to our country's research activities. This project was only possible because the competitive aspects of Universities were set aside to work toward the 70% open goal. We asked for (and were given permission to) share our internal resources carte blanche across all universities - ideas, workshop outlines, slide decks, web copy, resources, and more.

6. Enablers: Taking the time and effort to communicate clearly and maintain good relationships can have huge long-term benefits. This should not be underestimated. You never know when an existing relationship or connection will come in handy in the future!

7. Not all collaborations are necessary or successful and can be a large waste of time and resources. Consider carefully beforehand whether a collaboration is the right way forward before proceeding.

