Summary of SHARE Community Meeting, Fall 2014

Meeting Background

On October 13–14, 2014, members of the SHARE community gathered in Crystal City, Virginia, for their first face-to-face meeting. Attendees included more than half the members of the SHARE working groups (communications, technical, repository, and workflow), as well as SHARE Notification Service prototype participants and other stakeholders. The two-day meeting was intended to showcase progress on the Notification Service; identify challenges and opportunities related to the Notification Service prototype; explore future SHARE projects; and delve into ways in which the higher education community can play a proactive role in the stewardship of research. The meeting was convened with the generous support of the Institute of Museum and Library Services (IMLS) and the Alfred P. Sloan Foundation.

Sessions

The sessions at the SHARE meeting were a mix of panel discussions, formal presentations, guided exercises, and action-oriented breakouts. A real-time review of tweets by meeting participants may be found on Storify. The first day started with a welcome from Association of Research Libraries executive director Elliott Shore, followed by a three-part overview of the SHARE project (past, present, and future) delivered by SHARE staff. This session also provided an opportunity to introduce Tyler Walters, dean of libraries at Virginia Tech, as the inaugural director of SHARE.

The meeting continued with a deeper exploration of the SHARE Notification Service's technical development, led by representatives from SHARE's development partner, the Center for Open Science. For many meeting participants, this offered a first opportunity to see how the Notification Service prototype looks in action. Interested parties learned even more by attending a subsequent breakout session that offered an opportunity to discuss metadata, schema, and other nuts-and-bolts components of the Notification Service with Center for Open Science developers and prototype participants. Concurrently, others participated in a session led by working group members from Digital Science, Mendeley, and Microsoft Research—Amy Brand, William Gunn, and Alex Wade, respectively. This discussion focused on how SHARE notifications might be integrated into established workflows to render this information discoverable and usable by end users.

The first day concluded with a second set of concurrent sessions. One session delved into the hurdles and possible benefits of SHARE's planned second phase, creating a Registry that intelligently organizes research release events. This conversation was facilitated by SHARE's technical lead, Eric Celeste, and DuraSpace's CEO, Michele Kimpton. At the same time, a separate discussion concentrated on possible responses to public access funder mandates on campus. This session was led by ARL's Prue Adler, the University of Oklahoma's Rick Luce, and Ohio State University's Carol Whitacre. All three are members of the SHARE Advisory Board.

The second day of the SHARE meeting began with a panel discussion examining why SHARE is important to its sponsoring organizations the Association of Research Libraries (ARL), the Association of American Universities (AAU), and the Association of Public and Land-grant Universities (APLU). Senior representatives Elliott Shore, John Vaughn, and Michael Tanner made a persuasive case that the higher education community has both an opportunity and an obligation to play a leading role in the preservation of, access to, and reuse of research outputs.

The entire audience was then led by SHARE's marketing partners, Fearless Future, through a guided exercise to identify potential use cases and foundations of the SHARE story. This short workshop stimulated discussions across stakeholders at every table, raising the collective understanding of the power of a honed SHARE message.

The meeting next split into four smaller discussions, as each working group convened its first face-to-face meeting after 10 months of regular conference calls. More details on the working group breakouts may be found below.

As the final stretch of the meeting began, all parties reconvened as summaries of the breakout sessions were presented. Following this, representatives from the National Library of Medicine, the National Academies, and Dataverse—Jerry Sheehan, Paul Uhlir, and Eleni Castro, respectively)—provided unique insights into where we are and where we are headed in the data-sharing realm. The development of solutions that preserve and unlock research data for discovery and creative reuse is a key tenet of the SHARE project. This session explored the technical, policy, and attitudinal developments impacting the availability and reuse of research data.

The meeting concluded with a review/Q&A session led by Clifford Lynch, Coalition for Networked Information executive director and SHARE Advisory Board member.

Working Group Breakouts

As mentioned above, each of the four SHARE working groups (communications, technical, repository, and workflow) met in breakout sessions, supplemented by other

SHARE stakeholders attending the meeting. By way of background, the working groups have met regularly (once or twice per month) since late 2013 to help define the scope of current and future SHARE projects; to identify potential roadblocks in the development process; to refine the communication strategy as SHARE is introduced to a range of stakeholders; to serve as a sounding board on a variety of issues; and to provide crucial insights into the wants and needs of the research ecosystem.

Working group members led their peers in a detailed discussion focusing on an issue central to their distinct charter. The Communications Working Group focused on effective strategies for telling the SHARE story. Organized by Fearless Future and Boston University's Linda Plunket, this discussion covered ways to improve SHARE's website and marketing strategy; engaging interested parties via social media; and how to adapt SHARE's benefits for specific participants in the research chain (e.g., scholars, sponsored research offices, funding bodies). Among the key action items, the working group plans to sharpen the set of digital assets at SHARE's disposal so that the SHARE message can be tailored quickly and effectively to specific audiences. Additionally, this group will develop and share best practices for communicating key aspects of the SHARE vision to specific subsections of the research community.

The Repository Working Group—facilitated by ARL's Rikk Mulligan, Columbia University's Rebecca Kennison, and University of Illinois at Urbana-Champaign's Sarah Shreeves—explored the meaning and boundaries of the term "research output." Defining this term has ramifications for what gets captured and transmitted as part of the SHARE Notification Service. The group agreed that developing a clear boundary around research outputs is an important component of the Notification Service and Registry layers. This process will include defining metadata elements so that materials can be more easily classified at the time of their creation.

The Technical Working Group, aided by Kathleen Shearer of the Confederation of Open Access Repositories, considered international interoperability issues. This conversation flowed into a deeper exploration of who SHARE is aiming to serve, and how. Debra Hanken Kurtz of the Texas Digital Library and Alex Wade from Microsoft Research agreed to coordinate follow-up to this piece of the discussion. The working group charged itself to develop user stories to help clarify who wants what from SHARE, and why. These user stories will help SHARE prioritize some of the decisions it needs to make regarding Notification Service and Registry development. The stories will also assist the three other working groups as they socialize the case for SHARE among their constituents.

The Workflow Working Group explored how to better connect vice presidents for research (VPRs) and libraries around SHARE. Led by Ohio State University VPR Carol Whitacre and Virginia Tech dean of libraries Tyler Walters, the group explored the interests and motivations of each party, probing for areas of intersection. The shared

areas include facilitating research; developing and deploying data management plans; tracking research outcomes; presenting evidence of the institution's research strengths; accountability and compliance; integrating systems to reduce duplication of effort; and data analytics. The group agreed to further develop a set of issues and outcomes that could be used to strengthen the dialogue between VPRs and libraries, as well as to develop best practices for cross-pollinating service-level teams with representation from both units.

Next Steps

In addition to the activities identified by each working group above, a few other key themes emerged from the SHARE meeting. First and foremost was a strong interest in further honing the core SHARE message. This will make it easier for SHARE community members to explain both what SHARE is and why it matters to scholars, funding agencies, university administration, libraries, publishers, repository managers, students, and the general public. To that end, the SHARE team will more proactively promote SHARE as higher education's venture to promote good stewardship and accessibility of research. Good stewardship means taking care to optimize as many steps of the research life cycle as possible. It means making research (publications, data, and myriad other forms) accessible, discoverable, and reusable. This expansive form of stewardship will accelerate the pace of scholarly discovery, encourage innovation, enrich education, and demonstrate a tangible return on research investment.

Identifying precisely *how* SHARE will promote good stewardship of research is another key next step. The SHARE meeting highlighted SHARE's unique ability to engage the higher education community and other stakeholders in a series of interlocking infrastructure, workflow, and policy advances. These advances include, but are by no means limited to, developing the "connective tissue" that makes it easier to link repositories, metadata protocols, data storage, analytics tools, and other services into effective, interoperable systems (infrastructure); surfacing and methodically improving inefficiencies in the research life cycle (workflow); and ensuring the widest audience for the broadest set of outputs, with the lowest hurdles and for the longest period of time (policy).

Participants in the first SHARE in-person meeting were energized by the results to date and clear-eyed about the challenges and opportunities ahead. A second meeting, to be held in mid-2015, will provide an excellent opportunity to measure progress on the next steps identified here.

November 10, 2014