

# ARL practice brief on supporting bibliometric data needs: RLIF Final Report

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May 2022

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Welcome everyone. My name is Alison Hitchens and I'm the Associate University Librarian for Collections, Technology and Scholarly Communication at the University of Waterloo. Today I'm presenting on the work that Waterloo did as part of the ARL research library impact framework. This is based on a presentation Shannon Gordon and I gave at the Bibliometrics and Research Impact Conference in April 2021 with some expanded content working with Laura Bredahl.

## Project timeline

2018 ARL Pilots Project announced  
2019  
    Proposal accepted  
    Writing began  
    Internal & external feedback  
2020 Updates & final draft submitted  
2021 Published by ARL

### Library Impact Practice Brief Supporting bibliometric data needs at academic institutions

*Creators: Shannon Gordon, Alison Hitchens  
Library: University of Waterloo Library  
Date: Revised October 28, 2020*

#### ISSUE

- How can research libraries support their campus community in accessing needed bibliometric data for [institutional-level](#) purposes?

#### WHY IT MATTERS TO RESEARCH LIBRARIES

- Academic institutions increasingly need to quantify research impact for a range of internally and externally motivated purposes; for example, to better understand research performance, to benchmark, to demonstrate accountability, to inform strategic decisions, to assess reputation, to secure funding, to support competitive intelligence.
- Research libraries have the specialized knowledgebase



When the project was announced by ARL in 2018 our university librarian, Beth Namachchivaya, approached Shannon and I about submitting a proposal to do a practice brief based on our bibliometrics experience at Waterloo. Over the years I've had a few library directors reach out to me to ask about our practice and therefore we were confident we had an audience for this brief. Using a template from ARL, we began writing in 2019 with Shannon as the primary author and me providing suggestions for content and giving feedback.

An important aspect of the project was reaching out to colleagues for feedback. Internally it was essential to hear from our partners whether we had presented the bibliometric services and key learnings accurately. Externally we wanted to know if the brief made sense to those not in the Waterloo context and if what we included was considered valuable information. We also wanted to make sure that if we linked to other bibliometric service examples that we were using the appropriate links. ARL staff also gave us feedback based on how well the work fit into their project concept and encouraged us to add areas they thought would be of interest.

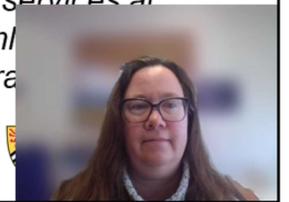
In 2020, Laura began as Waterloo's new Bibliometrics and Research Impact Librarian She was able to review the work through the eyes of someone who was learning the role and provide great thoughts for improvement.

## Practice brief value

Feedback from our reviewers helped us improve:

- Focus on the “why it matters” to libraries
- Added details in the ethical considerations section
- Added details to the resources needed
- Clarified partnerships and committees
- Identified things that were unique to Waterloo

*“I found this report to be very thorough in its description of the bibliometric services at Waterloo, and the introductory section on “Why it Matters” does well to highlight values that libraries can facilitate/gain by participating in bibliometrics programs.”*



According to ARL, a practice brief is intended to be a short, evidence-based document to support practitioners in improving library assessment work.

Shannon and I tried to keep it focused on what would be most useful to a library in deciding to start or revise a bibliometrics service and give guidance on what they need to think through. The feedback from our external reviewers was essential in making sure we had the right balance.

Reviewers emphasized the importance of the "why it matters" section which helps libraries understand why libraries are involved in this area. They suggested adding details to sections such as ethical

considerations and resources needed to run the service. They pointed out areas that needed clarification, and helped identify things that may be unique to Waterloo. I've included a quote from one reviewer as an example.

From a local standpoint, the practice brief helped us to reflect back on a service we had been offering for a few years, and think about the importance of the partnerships we have built with the Office of Research and Institutional Analysis and Planning. It was also a great tool for onboarding a new librarian and we used it to help the communications team

work on a piece about bibliometrics at Waterloo. The development of the brief has led to opportunities to present on our service with the OCLC Research Library Partnership and to facilitate a conversation around bibliometrics in libraries. I want to give a shout out to Rebecca Bryant at OCLC who continues to show a keen interest in our work and provides opportunities for networking.

I should mention that a practice brief in our mind is not the same as best practices. Our brief was mainly based on our Waterloo experience and some things may not apply to your context. We hope though that the topics covered are a guide to the things you need to consider.

## At a glance

### Background

Institutional context

### Service delivery model

Provided services

Service providers

Data sources

Service users & data use

Resourcing & staffing

### Key lessons learned

### Recommendations for the future

### Resources

Examples of other BRI services

Continuing education & PD

Recommended reading



When we started writing our practice brief, we really wanted to create something for **practitioners** to explore the **practical elements** of one institution's experience supporting bibliometric data needs

So, what does this document actually explore?

It includes **background information** to offer insight into the local context at Waterloo (for example: the role played by institutional readiness)

It does a deep dive into the various **layers of the service delivery model** we present: the type of service, who provides it, who uses it, data sources, etc

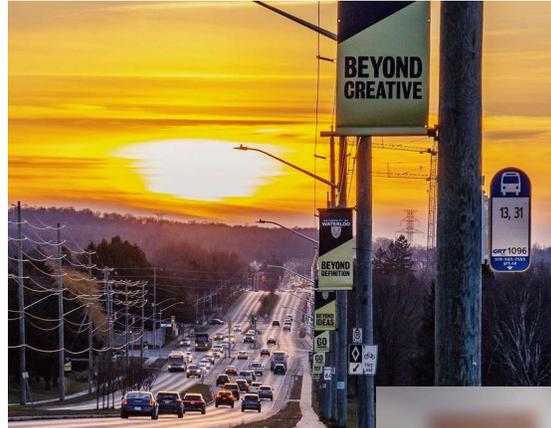
It also shares:

- A **range of lessons learned** across several years of providing this services, which I'll get into on the next slide
- **Recommendations for the future** (for example: **Continue to actively monitor evolution of other tools specializing in bibliometric data**)

It then concludes with highlighting some **practical resources** that may be of interest to others, including link to services at other institutions, professional development opportunities and recommended readings

## Lessons Learned

- Institutional readiness is critical
- Effective communication is everything
- Collaboration is key
- Build an external network



The brief gives details on a variety of lessons learned from working with bibliometrics. On reflecting on the service we think that institutional readiness was a key factor for Waterloo. A working group on bibliometrics was formed by the provost in 2013 with broad representation. The work of that group and the broad consultation from the white paper that resulted, was key to building an understanding of bibliometrics and fostering relationships, both of which contribute greatly to our work.

Like with most things we found effective communication to be really important. Bibliometrics is one measure of research impact which can effect institutional rankings, institutional grant opportunities, and the success of individual researchers. It is important to be able to communicate when bibliometrics are and are not appropriate and have sensitive conversations with senior administrators. Being able to communicate clearly the methodologies used, the scope and limitations is also important.

Collaboration with partners across campus has also been key to success. It has been important to develop skills and interest throughout the institution to share the work and allow the library to prioritize when we need to do the analysis ourselves and when we can be trainer and guide.

Similarly it has been important to build an external network to keep up to date on bibliometrics practice and share challenges. The Canadian Bibliometrics Community of Practice has been an important community for us to engage with.

We didn't mention it in the brief, but another obvious lesson is that things are constantly

shifting and changing with new bibliometrics tools being released, new questions asked of us, and new challenges for research impact such as the impact of COVID-19 on research productivity. It is important to keep our eyes on these changes and learn with them. The increased use of collaboration platforms like Microsoft Teams during the pandemic has helped us to create informal channels for chatting about these changes between meetings.

## New work since the report

- Bibliometrics & Research Impact Community of Practice
  - Practical information sharing
  - Training
  - Presentations and guest speakers
- Project to update the white paper on bibliometrics looking at bibliometrics practice through several lenses:
  - Better representing arts, humanities and social sciences
  - Alternative metrics
  - Equity, diversity and inclusion
  - Collaborative research
  - Impact of COVID-19
  - Practical guidance



I also want to highlight some of the new work we've been engaged in since the practice brief was finalized.

In late 2020, Laura launched the BRI CoP for campus. This has allowed practitioners to share information with each other on methodology, interesting work and challenges, for example a review of PowerBI dashboarding of bibliometric data by an academic department. Laura has also provided training, for example on taking control of researcher identities, and we've had guest speakers, for example this month John Aspler from ORCID-CA will be joining us.

This spring we've launched a project to update our white paper on bibliometrics. We hope to augment the paper by looking at bibliometrics through several lenses that are not well covered in the original publication, including better representing arts, humanities and social sciences, the use of alternative metrics, looking at bibliometrics with an EDI lens, collaborative research and the impact of COVID-19. We also want to explore opportunities for providing more practical guidance. We hope to publish a revised version in 2023.

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*Our greatest impact happens together.*

RLIF Final Presentation uWaterloo

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Thank you all for your attention and please reach out to Laura or I if you have any questions about our bibliometrics and research impact work.

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Finally, thank you to ARL for the opportunity to participate in this pilot project community.