

## **cIRcle Planning Retreat: General Summary**

### **Overview**

The cIRcle Planning Retreat on Wednesday, February 2<sup>nd</sup> 2011 focused on “Strategic directions for cIRcle, locally and nationally” and featured 45 participants from across the UBC Library, including members of the Library Operations Management Group, unit heads, librarians, M&P and support staff. The intent of the planning retreat was to support the strategic directions for digital repositories highlighted by the Library and by the University. The goals of the retreat were to establish an action plan to fully integrate and operationalize cIRcle, UBC’s Digital Repository, within the Library in view of potential regional and/or national roles and their implications for the Library.

### **Introduction**

Allan Bell, Director of Library Digital Initiatives, welcomed participants and began by outlining his vision for cIRcle. He proposed ‘that all intellectual output from the University of British Columbia be captured, curated and made available from the Library’s repository services’ including UBC research and learning materials as well as research and administrative data, and that digital preservation problems be solved in partnership with others.

Allan noted that this vision should be familiar as it represents a continuation of what libraries have always done:

- build collections
- make collections available/accessible, and
- preserve collections for the future

He said that ‘cIRcle is a natural progression, a logical extension of our core values into new formats and new opportunities.’ It also presents opportunities to ‘pursue local, regional and national collaborations.’ He noted that after 4 years cIRcle is still functioning in project mode and has now ‘in some ways become too successful and there are some reputational and optics issues for us to address.’ While recognizing the challenges, Allan noted that cIRcle is the only part of the Library’s strategic plan included in the University’s strategic plan. ‘This makes cIRcle a key service for us and a huge asset for the Library to position us for the future.’

### **Potential Models for cIRcle Operations: Centralized or Decentralized?**

The first activity of the day had participants record highlights and lowlights throughout cIRcle’s four year history and place these in a historical timeline. Following this historic scan participants worked in groups, with some groups discussing the advantages and disadvantages of a potential centralized operational model for cIRcle and others discussing a potential decentralized model. Results of these discussions were then presented to the entire group along with possible solutions for dealing with the disadvantages of each model. Recurrent themes included challenges regarding coordination, establishing and negotiating consistent and manageable priorities, and obtaining buy-in from Library staff and the University community for making cIRcle an integral part of the Library’s core services.

### **Group Members Poll of Preferred Model and Timeline**

Following this discussion, individuals were asked to record their 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, and 4<sup>th</sup> choices of model (centralized or decentralized, or possible hybrid models) plus implementation timelines for each of the following three functions:

- cIRcle Content Recruitment
- cIRcle Content Management Support

February 25, 2011

- IT (Information Technology) Support

The majority of responses included only a first choice with a strong preference for the following models:

- Decentralized or hybrid model for Content Recruitment—Immediately (i.e. within 3-18 months)
- Decentralized or hybrid model for Content Management Support—Immediately
- Centralized model for IT Support—Immediately

### **Obstacles to moving forward**

The early afternoon discussion identified underlying obstacles or blocks to moving forward. Obstacles were then reformulated as follows:

- Competing priorities hinder consistent coordination
- Conflicting priorities can make for ineffective time management
- cIRcle work is not viewed as an integral part of the work of the Library

**Note:** The obstacle presented by resource allocation/reallocation was raised. The facilitator ‘parked’ this issue, which should be discussed after the retreat in a different forum.

### **Strategies for dealing with obstacles to implementing the preferred model**

The final activity of the day required groups to review the disadvantages of operationalizing the preferred model, and to suggest ways of addressing them. All the suggestions were then clustered by theme, and groups incorporated them into a number of different strategies. The following strategies are intended to inform the action plan to be developed for operationalizing cIRcle:

- Prioritizing cIRcle as a core library service & campus service
- Establishing goals & targets for cIRcle
- Developing a persistent digital archives strategy
- Developing & supporting the scholarly content life cycle
- Establishing authoritative copyright & IP framework
- Streamlining acquisition of cIRcle content
- Establishing a training program with supporting documentation
- Doing what and how please (DWAHP!!)
- Updating the community

### **Next Steps**

A detailed summary for retreat participants was prepared and distributed, followed by this general summary for all Library staff. Allan Bell and Hilde Colenbrander will review the strategies developed by retreat participants and the opinions expressed that day, as well as advice from the Accelerate Research Project Team, and will develop a series of next steps. A communications strategy for keeping everyone up to date will also be developed. All Library staff will thus be kept informed of developments, and many will no doubt be involved as planning and implementation strategies for fully operationalizing cIRcle proceed.

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