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Communication and Outreach Planning

for the Prism institutional repository at Galter Health Sciences Library & Learning Center

Plan Development

- Goals for the Prism Communication and Outreach Plan:
  - Describe the communication, outreach, education, and **engagement materials** that will ensure the ongoing success of Prism
  - Identify the **timing and sequence** of engagement activities in relation to the migration and launch of the InvenioRDM software
  - Establish **specific messages**, use cases, and success stories for target audiences on the role of Prism in promoting open science, research reuse and reproducibility, what problems Prism is solving, and how audiences can use Prism
  - Identify **strategic partnerships** with groups on campus for the purpose of promoting Prism
  - Outline a workflow to acknowledge, discuss, and **respond to stakeholder** questions, concerns and needs

Key Date and Phase Development

Task Name	Phase	Description	Start Date	End Date	Associated Files	Completed?
Key Date		Incorporation of Wireframe for Prism	3/1/2021	3/31/2022	None	Yes
Key Date		Release of Version 6.0	8/1/2021	8/11/2021	https://inveniosoftware.org/blog/2021-08-05-inveniordm-lts/	Yes
Key Date		Data Migration scripts completed	5/1/2022	7/1/2022	https://github.com/galterlibrary/digital-repository/issues?q=is%3Aissue+is%3Aopen+label%3AMigration	No
Key Date		Release of Version 9.0	5/24/2022	5/24/2022	None	Yes
Key Date		Launch of Repository	10/3/2022	10/3/2022	None	No

- Create Phases for organizing Efforts:
  - Phase 0: Migration Tasks for 5 months prior to launch
  - Phase 1: Pre-Launch Tasks for 1-4 months prior to launch
  - Phase 2: Immediate Launch Tasks for 1-2 months during and after launch
  - Phase 3: Post-Launch Tasks for 3-12 months after launch
  - Phase 4: Long-term Tasks for 12 -24 months after launch

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Task Development

- Tasks included in the plan:
  - Name and Brand Identity
  - User Guide
  - User Experience Testing
  - Tour of Repository
  - Class on Repository
  - Social Media and News Items
  - Library Staff Training
  - Launch Event

  - Communicating with Users
    - Emails to current users
    - Emails to community owners
    - Emails to all-staff
    - Emails to library staff
    - Emails to campus groups

  - Also includes tasks for:
    - Collection Migration
    - Data Migration
    - Policy and Procedure Development

Task Organization

- Each Task includes:
  - **Team Members**: a list of each person giving input on the task
  - **Action Items**: description of major areas of work or outputs for the task
  - **Timeline:** a list of dates for each action item for the task, identified start and end dates for each task
  - **Supporting Files and Documentation**: links to helpful files from past work or folders for holding new work

- MOCHA Model
  - **Manager:** Supports and holds owner accountable through delegation. Serves as a resource, shares feedback, asks probing questions, reviews progress, and intervenes if the work is off-track. This person may or may not be the owner's supervisor.
  - **Owner:** Has overall responsibility for driving the project forward and coordinating steps to accomplish the goal. Ensures all the work gets done (directly or with helpers) and involves others (consults) in a meaningful way. There should only be one owner.
  - **Consulted:** Provides input and perspective. May share resources or referrals.
  - **Helper:** Implements aspects of the work and actively contributes to project success. The helper may own a significant area of work with its own MOCHA (we call this a cascading MOCHA).
  - **Approver:** Signs off on the final product or key decisions. May be the owner or manager, though it can also be a person or group with a clear decision-making role on the project.

Name and Brand Identity

Naming the repository is an opportunity to find a name that will resonate with users and what they can expect from the repository. Brand identity are the visible elements of the repository, such as color and design of the homepage or the design of any logo or images used for promotional material that can increase awareness and improve communication about the repository.

Major action items include:

- **Naming:** Lead the discussion on naming the repository
- **Designing an identity** for the repository**:**
  - Create options for Taglines and Purpose Statements
  - Wireframe options for homepage
  - Choose options for image assets
- **Identify possible promotional materials** for the repository:
  - Promotional materials such as pens, bookmarks, sticker
  - Slides for specific presentations
  - Interviews with current users
  - Infographic with repository info

User Guide

- Supporting documentation, policies and procedures for Prism will be housed in the Prism User Guide. To provide a seamless experience for users, each of the sections in the guide will be updated prior to the official launch of Prism

- **Getting Started with Prism**
  - Upload and Edit Items
  - Create and Manage Communities
- **Overview of Prism**
  - Content in Prism
  - Collections in Prism
  - Communities in Prism
  - Metadata in Prism
  - Visibility in Prism
  - Copyright in Prism
  - Background of Prism

- **Communication and Outreach**
  - Deposit Approval from Co-Authors
  - Mediated Deposit Approval
  - General Communications
  - Outreach Materials
- **Policies and Procedures**
  - Terms of Use
  - Deposit Agreement
  - Collection Development
  - Accessibility
  - Mediated Deposit Service

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https://libguides.galter.northwestern.edu/digitalhub

Task: User Experience Testing

- During the pre-launch phase, user experience testing of the InvenioRDM platform will provide feedback for further developing features, suggesting changes to workflow, re-working language and improving supporting documentation for the repository. Users can consist of library staff, faculty, staff, and students; those who have used the repository and those who have not.

  Major action items include:

  - Write scenarios for user testing
  - Determine the platform for collecting user responses
  - Determine who will be contacted for user testing
  - Determine the dates of user testing
  - Administer user testing
  - Review the results of user testing
  - Incorporate the results in
    - feedback to developers
    - updates to the User Guide
    - in pre-launch communications and presentations

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Class and Tour of Repository

The "tour of the repository" is a 15-20 minute introduction to Prism that will be available in both a live and recorded format. The tour will be offered to departments, institutes, centers, and faculty members (see communication sections below).

The tour will include:

- Description of content that can be uploaded in Prism
- Visual navigation to the repository
- Demonstration of uploading and editing item records
- Demonstration of creating a community
- Links to the online guide and contact information

The class on the repository is a 45 minute to 1 hour overview of Prism that will be available in both a live and recorded option. During the launch phase, the class will be offered in Galter Library's educational offerings and also to departments, institutes, centers, and faculty members (see communication sections below).

The class will include:

- An overview of open access and open science
- Discussion on copyright and licensing for open access
- Description of content that can be uploaded in Prism
- Examples of records and collections currently in Prism
- Visual navigation to the repository
- Demonstration of uploading and editing item records
- Demonstration of creating a community
- Links to the online guide and contact information
- Possible hands on portion for users to upload items

Communicating with Users

It is important to communicate with current users of our repository platform prior to launch of a new platform so that they are aware of changes and have an opportunity to respond with concerns or questions.

- Communications with users about the repository will focus on:

  – what changes users need to know about,
  – how those changes impact users,
  – what questions users are likely to ask,
  – the creation of communities for each department, institute, and center,
  – tour or presentation can be offered to their faculty, staff and students

Communicating with Users

- Communication with Campus Stakeholders

  - Create community among stakeholders that will foster acceptance and ongoing use of Prism

  - Help stakeholders understand what problems Prism is solving, and how audiences can use Prism

  - Learn more about how different stakeholder groups provide support for research

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Social Media and News Items

- There are several available communication channels to communicate with new and current users during all phases of the communication and outreach plan, including newsletters, Twitter, and Facebook.
- News items may include:
  - Prism is the new repository for Feinberg School of Medicine
  - A 30 day dissemination challenge with Prism
  - Prism is part of the NIH GREI
  - Boost your Research Data with Prism

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Library Staff Training

We will host two (2) trainings for Library staff (possibly other library-stakeholders) prior to the launch of the Prism.

Goals of Library Staff Pre-Launch Training

- Introduce the InvenioRDM platform to library staff
- Describe "how to" (and, if possible provide hands on experience) uploading content and editing records
- Discuss the new features, changes, upgrades provided by InvenioRDM
- Review policies and documentation for the repository
- Review Frequently Asked Questions and available responses
- Explain the communication strategy, target audiences and specific messaging
- Discuss the development roadmap and launch timeline, and communication strategy for the new repository platform

Launch Events

- The Open Science Series celebrates the launch of Prism, Feinberg School of Medicine's newly enhanced open access repository. The series focuses on the current needs of FSM researchers as they navigate making their work openly available using terms that enable reuse, redistribution and reproduction of the research and its underlying data and methods.

- The series will run for six months from October 2022 – March 2023 and will be available to all Feinberg faculty, staff, and students. Most sessions will be held via Zoom and recorded. Recorded sessions will be made openly available in Prism.

- Classes may include:
  - Prism: Collect, share, preserve
  - Creating a Community of Research in Prism
  - Specialized Data Curation
  - Getting to know the NIH Policy on Data Management and Sharing

Questions for Group Discussion

- What work management models, frameworks, or tools have your team found most helpful? Share with the group a little about the tool.
- What modes of communication (i.e. Twitter, Facebook, news items) have you found useful for your institutional repository?
- What topics of communication (i.e. data sharing, preserving work) have users found most helpful for your institutional repository?
- What are the types of questions and concerns you receive from your users?
- How have you planned out communication and outreach for your institutional repository?

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