Effectively Engaging the Next Generation of Researchers & Librarians to Advance Open: Lessons Learned from OpenCon & Opportunities for the Future

Nick Shockey
Director of Programs & Engagement, SPARC
Founding Organizer, OpenCon
Available at: bit.ly/openconcni17
Setting the default to open in research & education is a culture change problem.
Culture change is difficult.
“For organizations seeking to become more adaptive and innovative, culture change is often the most challenging part of the transformation.”

“Changing your organizational culture is the toughest task you will ever take on.”
- The Balance https://www.thebalance.com/how-to-change-your-culture-1918810

“Changing an organization’s culture is one of the most difficult leadership challenges.”

“The hardest part of a business transformation is changing the organizational culture – the mindset and instincts of the people in the company.”
- Torben Rick https://www.torbenrick.eu/blog/culture/create-a-culture-change/

“But changing an entrenched culture is the toughest task you will face.”
The work is nuanced. Each of us, in our own efforts as individuals, and in our roles at our institutions or organizations, will likely only make small inroads at first. The work will be a meditation in patience. There will be pitfalls and frustrations. It will be hard. But the sustained and united effort will make a difference.

Claire Coulter, “#OpenCon 2. Reflection”

Source: http://www.clairecoulter.com/musings/opencon-2-reflection
Culture change is difficult.

It’s even more difficult at scale & in context.
We invest in...

Infrastructure
- COS (Center for Open Science)
- Sage Bionetworks
- arXiv.org

Publishing
- PLOS
- Open Library of Humanities
- eLIFE

Advocacy
- SPARC
- LIBER
- DATA Coalition
Robin Champieux
@rchampieux

• Created a grant funded program called Open Insight to engage OHSU students and early career researchers on topics related to open data and open access
• Organized ScienceHack PDX
• Organize monthly series of open data / data science education workshops in collaboration with computational scientists on campus;
• Helped educational department establish a open access anthology of student work
• Advocated for changes to OHSU's intellectual property policy.

Source: OpenCon Impact Survey
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“In one way or another OpenCon was a catalyst for all of this work! Largely the list of activities above has leveraged the relationships I've developed with OHSU students, scientists, and postdocs. I was inspired and learned how to establish these relationships at OpenCon. My attendance and the student attendance we've since sponsored has really been a game changer for us.”

Source: OpenCon Impact Survey
“In early 2015, I saw a flyer for a roundtable discussion on scientific publishing on my campus…”

Source: OpenCon: An Unexpected Journey: https://science.mozilla.org/blog/opencon-an-unexpected-journey
• Helped create Open Insight series at OHSU
• Organizing team for csv,conf,v3
• Open Advice (https://kirstiejane.github.io/OpenAdvice)
• 2017 Mozilla Open Science Fellow
Helped create Open Insight series at OHSU
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Source: OpenCon Impact Survey
Robin Champieux
@rchampieux

Danielle Robinson
@daniellecrobins

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“It's had a major influence on my career!”

Source: OpenCon Impact Survey
“Together with Amie Fairs, a PhD student in The Netherlands who I met at OpenCon 2016, I started a project called "Why Not Open Science?" aimed to assess the current attitudes of researchers in academia towards open-science practices. The goal is to have data in hand to inform us and our institutions on the most effective educational approaches that will hopefully guide researchers to incorporate open-science practices in their daily routines. Our project is one of this year's Mozilla Open Leadership Projects and will be presented to the community at the Mozilla Global Sprint in June 2017.”

Source: OpenCon Impact Survey
Beginning in 2014, Robin’s trip to OpenCon and involvement with the community brought open issues to the forefront on our campus and brought me into the fold through on-campus events. My trip to OpenCon 2015, sponsored by Robin’s NLM grant, sparked a larger collaboration that has engaged hundreds of researchers. In 2016, two more students went to OpenCon sponsored by the OHSU library. This is how a local network grows and this is how an institution demonstrates commitment to open science. In 2016, I received a Mozilla Science fellowship, enabling me to dedicate more time to my open science projects and further develop my advocacy skills. None of this would have happened if Robin hadn’t gone to OpenCon 2014.

OpenCon, Robin said, “has not only sparked our strategies for making open science the norm at OHSU, it also influenced the career trajectories and success of everyone we’ve sent. It is really amazing how influential it’s been.”
| **OpenCon Cascadia** | We are committed to hosting a North American Pacific Northwest OpenCon satellite even in Spring 2018. Our high-level vision is to build the entire conference around two goals/themes – we want to prioritize actionable educational and advocacy programming, and we want to explore the relationships between open research, diversity, and inclusion in deep, critical, and meaningful ways. | Our goal for the doathon is to listen to ideas about ways to build a event that is relevant, actionable, and inclusive. We would love to walk away with some of our planning tasks accomplished...essentially we want to get inspired and get a head start. |
| **Open and Reproducible Conference Questions** | Stand up and make "open" heard: ask these questions at academic/research conferences | Help with identifying/tweaking questions, Help finding resources related to a given question, Writing guidelines for how to be respectful while posing questions |
| **Open Research Guru** | Be your team's open* guru! Listen, support, champion | Build a website that showcases how and why you should be your team's open* guru, Create network for fellow open* gurus |
| **Open Access Asia** | Open Access Asia is a regional community of enthusiasts advocating for Open Access, Open Research Data, Open Education aimed at increasing public engagement in scholarship. This project was born at OpenCon 2017, to create a platform of resources for sharing, learning and collaborating entities around open practice across Asia. | Coding Website, Regional Community experience from Latin America and Africa. |
| **Countering the Sharks in Open Waters - An 'Open' Discussion Toolkit** | This project is an advocacy toolkit that provides users with common reasons not to use open with counter arguments. | Content creation |
| **How might we get the Commissioner for Human Resources, Science and** | We will discuss the ways of which we will use to advocate for Openness in the African Union through its Commissioner for Human Resources, Science and Technology. | Brainstorming and connections. |
### Table 5. General Scholarship Allocation by Region

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Source: OpenCon Diversity, Equity, and Inclusion Report
sparcopen.github.io/opencon-dei-report
Roshan Karn
@rosankarn
“OpenCon is where I acquired knowledge about OA, OER and OD. OpenCon gave me the idea of the work that could be done in the Open space and the importance open access carries especially for a country like Nepal. Through OpenCon I have had the chance to meet my mentors, colleagues in my region and this has helped me push the open momentum in Nepal. Through OpenCon I have had extensive networks which has helped our events to gain financial support, resource person and has helped in the capacity building of our participants.”

Source: OpenCon Impact Survey
ASIAN REGIONAL MEETING 2017
Open in Action: Reaching The Information Divide
December 2-3, 2017
Hotel Annapurna, Kathmandu, Nepal
Roshan Karn
@rosankarn

Kanok Monirul Islam
@KanokMonir
Roshan Karn
@rosankarn

Maryam Qonita
@qonitamaryam
"I feel much better connected to other people at my institution who care about changing the current academic award system through the OpenConCam community and satellite event. I feel more connected at a global level through the main OpenConCon conference. I've found that OpenCon has given me confidence to see myself as an agent of change, and has provided a lot of moral support in the (often difficult) conversations in which I try to make that change happen!"

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Source: OpenCon Impact Survey
1) In December 2015, I joined OpenConCambridge’s monthly meetings.

2) I gave a talk on “Frustrations with exploitative publishers; open access solutions”, which was part of a discussion to develop an open research policy for the University of Cambridge. Organised by the Office of Scholarly Communications, University of Cambridge, June 2016 (my slides and the resulting report are available at www.CorinaLogan.com/publications.html).

3) I gave a talk in July 2016 to the Department of Zoology at the University of Cambridge titled “Researchers are terrible business people...but we don’t have to be” on how we exploit ourselves and discriminate against others by publishing articles behind paywalls at publishers that drain money out of academia.

4) I co-organized OpenConCambridge’s satellite event and was the moderator throughout the event.

5) Because of the OpenCon Cambridge event, I decided to stop reviewing for non-100% OA journals at exploitative publishers.

6) I put my publishing ethics on my website (www.CorinaLogan.com). Students have approached me because of these ethics, saying they admire my commitment and that this is something they want to see more of.

7) I led opposition to the University of Cambridge signing an exploitative contract with Elsevier in December 2016: I gathered data in the Department of Zoology showing that 39/40 researchers did not want the university to sign the contract, but instead to negotiate a better deal for us. The university ended up signing the contract despite opposition from departments across the university (science and humanities departments). Ever since, I have been trying to change how the university subscribes to journals, specifically to connect researchers with the cost of their publishing choices.

8) I was invited to talk at an OpenCon Community Call on Big Deals to share my story about mobilizing around the Elsevier contract (25 January 2017).

9) I am leading a movement at Cambridge (and eventually through the broader UK) to get institutions to understand how they can better support Early Career Researchers by giving us the freedom to publish wherever we want with the goal of increasing scientific rigour.

10) I was invited to give a talk to the Department of Zoology at Cambridge at the end of March 2017 to provide an update on what happened around the Elsevier contract.

11) I was invited by the Office of Scholarly Communications to give a talk at Cambridge on open peer review (March 2017).
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Source: OpenCon Impact Survey
Bullied Into Bad Science

Leading individuals and institutions in adopting open practices to improve research rigour

The letter

The Bullied Into Bad Science campaign is an initiative by early career researchers (ECRs) for early career researchers who aim for a fairer, more open and ethical research and publication environment.

Bulliedintobadscience.org
“I came to realize so many aspects of the opening up processes during the conference that were out of the picture for me until then. Specially, I have met (and started to follow up) great and experienced people. Coming from outside the scientific community (I’m more of a policy-maker). The OpenCon community has given me the confidence to speak up and promote those issues that I consider of importance, even when the daily routine can be exhausting and frustrating. Knowing that someone has already considered that you can make something for this kind of change brings comfort at hard times.”

Source: OpenCon Impact Survey
Creating Culture Change at Scale & in Context
~700 alumni from 80+ countries
29,000+ applicants
From 176+ countries
2014-2016:
4,100+ satellite event participants across 70 events, in 32 countries, held in 13 languages
SATELLITES IN 2016

- 28 events
- 2200 participants
- 20 countries
- 9 languages

Countries applications came from
Satellite event locations 2014 - 2016
Creating Culture Change at Scale & in Context
We must offer to amplify the voices of others, rather than speaking for them.

Claire Coulter, “#OpenCon 2. Reflection”
Source: http://www.clairecoulter.com/musings/opencon-2-reflection
2017 Organizing Committee

Organizing Committee by Region of Citizenship
- Latin America: 13.3%
- Asia: 20.0%
- Africa: 20.0%
- Europe: 26.7%
- North America: 20.0%

Organizing Committee by Gender
- Male: 46.7%
- Female: 46.7%
- Non-binary: 6.7%
WHAT’S IN THIS REPORT?

Lessons Learned on Planning an Inclusive Conference
We outline practices we have incorporated into our conference planning so far, as well as areas that we will improve in the future.

Conference Checklist
Drawing both from our own practices and public resources on inclusive and accessible event planning, we have created a standard checklist of actions conference organizers can take when planning events, workshops, and conferences.

We share figures illustrating OpenCon’s global conference demographics from 2014 to 2016, indicating areas of improvement over our three-year history and areas that still need work.

LESSONS LEARNED ON PLANNING AN INCLUSIVE CONFERENCE

1. Diversity of Organizing Committee, Speakers, and Participants
2. Programming Choices that Center Diversity, Equity, and Inclusion
3. Participant-Driven Programming
4. Ensuring your Venue is Accessible and Inclusive
5. Ensuring that Conference Media is Accessible
6. Ensuring that Opportunities to Engage with the meeting are accessible and Inclusive
7. Enforcing a Code of Conduct
8. Additional Considerations

Source: OpenCon Diversity, Equity, and Inclusion Report
sparcopen.github.io/opencon-dei-report
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sparcopen.github.io/opencon-dei-report
### TABLE 1. GENDER REPRESENTATION ACROSS ATTENDEES

<table>
<thead>
<tr>
<th>Year</th>
<th>Female</th>
<th>Male</th>
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<td>2015</td>
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<td>2016</td>
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### TABLE 2. GENDER REPRESENTATION ACROSS SPEAKER TYPES

<table>
<thead>
<tr>
<th>Year</th>
<th>Keynote</th>
<th>Panel Moderator</th>
<th>Panelist</th>
<th>Project Presenter</th>
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Transparency leads to accountability leads to change.
If we’re going to create culture change, the place to start is with the next generation.
TRAVEL SPONSORS
WEBCAST SPONSOR
If you want ROI, invest in people.