## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview: Covid-19 and the digital shift in action</td>
<td>4</td>
</tr>
<tr>
<td>Organisational context</td>
<td>7</td>
</tr>
<tr>
<td>Skills and leadership</td>
<td>13</td>
</tr>
<tr>
<td>Scholarship and collections</td>
<td>17</td>
</tr>
<tr>
<td>Physical and digital spaces</td>
<td>22</td>
</tr>
<tr>
<td>Moving forward</td>
<td>26</td>
</tr>
<tr>
<td>Further reading and useful links</td>
<td>32</td>
</tr>
<tr>
<td>Appendices</td>
<td>33</td>
</tr>
<tr>
<td>Appendix I List of contributing RLUK members</td>
<td>33</td>
</tr>
<tr>
<td>Appendix II Overview of interview process</td>
<td>34</td>
</tr>
</tbody>
</table>
COVID-19 AND THE DIGITAL SHIFT IN ACTION

This report provides an overview of the experiences of RLUK members in response to the Covid-19 pandemic. In particular, it explores the extent to which the period of the Covid-19 pandemic represented the ‘digital shift in action’ amongst research library services, operations, and collections. This report forms both part of RLUK’s wider work surrounding the experience of its members during the Covid-19 crisis and its activities around the digital shift.

OVERVIEW: THE DIGITAL SHIFT

The digital shift is used as an umbrella term for the analogue-digital transition of many library services, operations, collections, and audience interactions. This work around the digital shift forms part of RLUK’s current strategy, Reshaping Scholarship, and very broadly, relates to the impact of digital technology on the research library:

Collections: reflecting the increasing volume of digital collections within research libraries, whether as born-digital archives, digitised content, data, research outputs contained within repositories, or electronic books and journals (e-print).

Operations: where an increasing portion and variety of library activities are delivered or enabled digitally, whether via remote access online or within the library itself, through resources such as digital scholarship labs, makers spaces or digital creativity hubs.

Connections: as the library’s own digital collections are diversifying so are the collections scholars and students can access through the library.

Audience: that the digital shift provides opportunities for the research library’s audience to shift, grow and change, bringing more people into contact with the research library, in different ways, and for different purposes.

The changes occurring in each of these areas brings a variety of challenges and opportunities in relation to the library’s role in supporting and enabling scholarship, the skills contained within the library, its spaces, and its relationship with external stakeholders.

THE MANIFESTO FOR THE DIGITAL SHIFT IN RESEARCH LIBRARIES

In order to provide a vision around the digital shift, RLUK has created a manifesto for the digital shift in research libraries. Launched in May 2020, the manifesto provides a vision for the research library of the future and outlines a series of tangible actions to enable its realisation. It is divided between four thematic areas and is the result of extensive member engagement through surveys, workshops, conference presentations, and network meetings, and comes with an ambitious delivery plan for its implementation.\(^1\)

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1 Further details regarding RLUK’s definition of the ‘digital shift’ and the work that falls under this strand of its strategy can be found on RLUK’s website: [www.rluk.ac.uk/digital-shift](http://www.rluk.ac.uk/digital-shift).

2 The four focus areas of the manifesto are: scholarship and collections, skills and leadership, stakeholders and advocacy, and spaces.
COVID-19 AND THE DIGITAL SHIFT IN ACTION

As the threat from Covid-19 increased, services were rapidly realigned as library buildings were physically closed across mid-March 2020. As a result of closure, this period saw the transition to online-only provision of research library services, operations, access to collections, and audience engagement, at an unprecedented speed. This period therefore provides a unique opportunity to explore the experiences of RLUK members around the digital shift during a period of extraordinary and rapid service realignment.

This report explores how RLUK member libraries prepared for this change, their experiences of working remotely, and what plans they put in place to enable their recovery. It touches on issues of staffing, decision making and contingency planning, and the perception of the library within the institution. It also uses the experience of RLUK members to examine the adaptability of the UK’s digital infrastructure, particularly around collections, and considers the extent to which the Covid-19 crisis might bring lasting change in how research libraries operate, both in terms of the digital shift and more widely. It is intended that this report provide an account of member experiences during a period of profound change and enable a degree of benchmarking between research libraries. It also places the contents of RLUK’s digital shift manifesto within the context of the Covid-19 pandemic and how the manifesto’s contents can support research libraries navigate their ‘new normal’.

METHODOLOGY

The findings of this report are based on a combination of qualitative and quantitative research. Between March and June 2020, members of the RLUK Executive engaged closely with RLUK member libraries to explore and document their experiences of the Covid-19 crisis. This report is based on five strands of research:

Qualitative interviews: twenty in-depth interviews were undertaken by the RLUK Executive with seventeen RLUK member libraries between April and June 2020. Thirty-six colleagues contributed to these interviews, including library directors, members of senior management teams, and other staff. The interviews sought to establish the extent to which this period represented the digital shift in action and focused on the experience of colleagues around a combination of thematic and chronological themes:

- Incident response: physical closure and moving online
- Working remotely: delivering services and collections online
- Recovery: preparing to reopen and opportunities for new ways of working
- Reflections and responses: to RLUK’s manifesto for the digital shift in research libraries

RLUK network correspondence: a review of member correspondence shared on RLUK’s seven JiscMail lists was undertaken. This provided an overview of a number of the emerging experiences of members regarding their responses to Covid-19.

Covid-19 and the digital shift in action, survey responses: a quantitative survey was undertaken of the wider research library and information communities regarding their experience of Covid-19 and the digital shift. Questions sought to establish the extent to which the Covid-19 crisis represented the digital shift in action, and whether the crisis had led to substantive changes in organisational services and operations. The survey was linked to the launch of RLUK’s digital shift manifesto and was open between 15 and 18 May 2020. 336 responses were received, the majority of which came from libraries belonging to a higher-education institution (70%) and from organisations from within the UK and Ireland (78%).

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3 The quantitative and qualitative results of RLUK’s digital shift survey are available at: www.rluk.ac.uk/digital-shift-manifesto-launch [accessed on 15.06.20].
International research library plans for reopening: a quantitative survey was undertaken of members of the international research library community between 29 May and 3 June 2020.\textsuperscript{4} This survey was completed by 60 respondents, 44\% of which represented RLUK members, 23\% members of the Association of Research Libraries (United States), 10\% Consortium of Academic and University Librarians (Australia and New Zealand), and 8\% Canadian Association of Research Libraries (Canada).

RLUK member network meetings: RLUK’s Associate Directors’ Network, Special Collections Leadership Network, and Digital Scholarship Network all explored elements relating to the digital shift in network meetings during May 2020. Members of the RLUK Executive presented to these network meetings, including in order to provide an overview of the early findings of this wider research and to elicit responses to its headline findings.

REPORT STRUCTURE

The report is divided into five sections, which are partially aligned with RLUK’s manifesto for the digital shift in research libraries.\textsuperscript{5} They relate to the organisational context in which RLUK libraries first responded to the pandemic, the experiences of members working remotely in regards to skills and digital leadership, the relationship between digital and physical collections, and the preparations for reopening. The report concludes with a series of recommendations and a broader consideration of the contents of RLUK’s digital shift manifesto.

\textsuperscript{4} The quantitative and qualitative results of the IARLA reopening survey are available at: https://iarla.org/2020/06/recover-retrench-reset/ [accessed on 15.06.20]
\textsuperscript{5} www.rluk.ac.uk/digital-shift-manifesto [accessed 15.06.20].
ORGANISATIONAL CONTEXT
Incident response, physical closure, and the move online

KEY POINTS

- **Rapidity of events**: that events moved quickly which made scenario planning difficult, with RLUK members having to respond to a complex mix of internal-library, institutional, and external drivers.

- **Decision-making process and alignment**: the responses of member libraries were influenced and shaped by their wider institutional contexts and variation existed between university members and national libraries.

- **Business continuity planning**: few member libraries had contingency plans specifically in relation to pandemics. Eventual plans for library closure and remote working were developed iteratively and at speed, through the combination of a series of pre-existing scenario plans or from scratch.

- **Variation in working environments**: variation existed between RLUK members regarding their established capabilities to support flexible remote working. A number of members already supported remote and flexible working, whereas this was unfamiliar and less well established for others.

- **Covid-19 as a catalyst**: for many members, Covid-19 acted as a catalyst for change, cementing and confirming emerging ways of working, and embedding these at greater speed.

- **Enabling remote working**: a series of hardware and software challenges were encountered by the majority of members in enabling remote working, which were largely remedied in the first weeks of lockdown.

- **Digital divisions**: the experience of lockdown revealed issues of digital inequality amongst staff and in relation to individual roles.

ORGANISATIONAL PLANNING

The onset of the Covid-19 crisis witnessed a rapidity in events and decision-making across RLUK member libraries. From late February and early March, RLUK members began to make a series of contingency plans as the likelihood of a pandemic increased. The nature of these plans was seen to change rapidly, with a number of members reporting that scenario plans were created on one day, only to be surpassed by events shortly afterwards and having to be revised, sometimes on an hourly basis. Definitive planning was made difficult by the fast-moving situation, the fluidity of wider institutional plans, and the absence of government guidance (within the UK and England in particular).

How RLUK members initially responded to the outbreak of the virus, especially regarding their decision to close their library buildings, was dependent on a series of factors related to their institutional context. As has been revealed by RLUK’s earlier research into the initial impact of Covid-19, for some of RLUK’s university members, there was institutional pressure for the library building to remain open on campus during the early stages of the pandemic. This reflected the fact that the library building provided valuable communal space at a time when other university spaces were being closed, and that libraries were seen as crucial in supporting staff and students who remained on campus.

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6 The responses of member library to the initial outbreak of the virus, and the decision to close physical libraries, has been explored specifically in an earlier RLUK report, M. Greenhall, *The initial responses of RLUK member libraries to the Covid-19 crisis* (March 2020), available here: https://www.rluk.ac.uk/report-the-initial-responses-of-rluk-member-libraries-to-the-covid-19-crisis/
The importance attached to maintaining library buildings also revealed how libraries were sometimes perceived within their wider institutions. It reflected the close association between the library building and the services that the library provided, that the library was sometimes perceived as a ‘physical space offering physical services’, and that its building was seen as a ‘campus citadel’. The closure of library buildings, whether sited on a campus or within a cityscape, had an emotional and psychological impact, as well as a scholarly one. As a result of these reflections, and obscurity regarding the potential scale of the pandemic, initial plans often focused on the library’s ability to maintain services with reduced staff capacity, whether due to sickness or the shielding of vulnerable colleagues. The wholesale closure of buildings was not necessarily envisaged during much of the initial planning period and plans instead focused on the greater delineation of library spaces to support social distancing and to identify staff who might be particularly vulnerable.

Several member libraries reflected that their existing business continuity plans did not include contingencies in relation to a pandemic. As a result, no single document provided plans regarding how a member library or institution should respond to the outbreak and spread of an infectious disease. As a consequence, members combined a series of scenarios contained within their business continuity plans in relation to other events, including those dealing with the potential impact of a no-deal Brexit, the inability of staff to travel into work (e.g. due to adverse weather), or the removal of physical access to a building (e.g. due to an onsite incident).

Other members created contingency plans from anew, finding this a more efficient way of responding to a rapidly developing situation. The spread of the virus did expose that business continuity plans are, by their nature, built around key functions and roles to ensure the continuity of business. Although key decisions were made based on these variables during the period of closure, the vulnerability of individual staff members became an important determinant of whether they began working remotely. The intertwining of personal circumstances and professional responsibilities represented a shift in contingency planning for a number of members.

"...the library was sometimes perceived as a ‘physical space offering physical services’, and that its building was seen as a ‘campus citadel.’"

DECISION MAKING AND INSTITUTIONAL BENCHMARKING

Many of RLUK’s university members reported that their library’s plans were heavily dependent and aligned to wider institutional decision-making, with a gold, silver, and bronze decision-making hierarchy being instituted during the early stages of the pandemic at an institutional level (in which the library was represented), and that similar structures were adopted within the library. Whereas RLUK’s university members were making plans within this wider institutional context, RLUK’s national library members reflected on a high degree of autonomy regarding their initial responses to the spread of the virus and that they operated without the ‘cladding of wider institutional decision-making’.

7 Interviews were undertaken with colleagues from the National Library of Scotland, National Library of Wales, and the British Library, who all reflected on the high degree of autonomy the library experienced in its decision-making regarding closure.
All three of the UK national libraries reported continual and close engagement with government ministers and members of the civil service during the initial phases of the lockdown. They also stressed the importance of communication with one another and liaison with other national libraries elsewhere (especially those which had an earlier chronological experience of the virus).

The ability of RLUK members to benchmark their own plans, and physical closures, against one another (and those institutions beyond the RLUK membership) was an important feature of their growing ‘case for closure’ and one cited by members during interviews. This was particularly the case amongst RLUK’s UK members due to the absence of definitive government guidance or advice until lockdown was invoked on 23 March. This was in contrast to the experience of Trinity College Dublin, where the Irish government brought in lockdown earlier on 12 March, and their advice was definitive. What marked the experience of RLUK members, whether in the UK or the Republic of Ireland, was the rapidity of events and the need to constantly revise contingency plans to reflect the changing situation.

PRACTICALITIES AND ENABLING REMOTE WORKING

In the immediate days before the closure of their library buildings, members enabled an increasing proportion of their staff to work remotely, whether for their own safety or to test remote access to systems. Variation existed across RLUK member libraries regarding their familiarity with remote working. A number of members had long established remote working policies and had been moving to enable flexible working before the lockdown as a part of their normal business. This included the replacement of desktop computers with laptops and docking stations, the adoption of hot desking within library offices, and the creation of virtual private networks and remote desktops to enable smooth access to systems remotely.

Many members cited that remote working platforms such as Microsoft Teams, OneDrive, and SharePoint were being rolled out across their organisations before the Covid-19 pandemic, and in a number of instances colleagues already had experience of these (often associated with their work on a particular project). These infrastructural elements came alongside extensive staff training within some RLUK members around the use of virtual learning and working environments. A number of members were, therefore, well placed for remote working, in that many of their staff had access to suitable hardware and software and had some experience of working offsite.

Such a level of experience and familiarity with remote working was not the uniform experience across member libraries. A number of members reported that, although discussions were sometimes ongoing, staff had relatively little experience of remote working and that their working practices were still largely desktop based. There was also a degree of variation within institutions, even for those that had pursued a flexible and remote working policy. Front of house and collection-based staff, for example, were less likely to have worked remotely than others and were unlikely to have the hardware or software available to them to do so immediately at the point of library closure. Variation therefore existed between, and within, RLUK member libraries in regards to remote working.

TRANSITION TO REMOTE WORKING

The days leading up to, and immediately following, the physical closure of library buildings represented a significant period of transition for RLUK members in terms of their working practices and the movement of these online. Even those members that had considerable experience of remote working were unused to doing so at such a scale, and not all staff had previously done so. In order to enable and inform this transition, members undertook a series of data-gathering exercises via staff surveys. These sought to establish the hardware and software needs of individual colleagues to enable them to work effectively online and identify those who already had appropriate equipment and remote access, and what additional resources were required to facilitate this further.
The ability of member libraries to quickly establish the hardware and software needs of colleagues was central to the transition to remote working. This transition was aided by the availability of loanable laptops within many member libraries, usually available to students. These were requisitioned by IT services and repurposed for the use of staff across the institution and often included those working within the library. This came alongside the identification of software requirements and the enabling of remote access to library systems. A number of members reported that their library management systems only permitted onsite access and that one of the first steps to be taken was to enable remote access to these, which included establishing VPN clients, and also enabling remote back-up. This presented a number of challenges concerning licensing and designated access for individual colleagues, which were overcome in the initial days following lockdown with backups to the Cloud removing the need for onsite interventions.

The mapping of staff digital capabilities continued after the initial lockdown and reflected the rapidity of the transition to remote working. Surveys continued to take place regarding staff hardware and software requirements, and additional resources supplied where appropriate and possible by IT teams. In addition to hardware, this also included the supply of ergonomic equipment such as office chairs, additional monitors, and accessories in the weeks after lockdown. Throughout this process, the library’s close working relationship with other professional services departments, and IT in particular, was essential, and the majority of members interviewed praised the speed and reactiveness of IT services.

DIGITAL INEQUALITY AND CONNECTIVITY

Surveys also took place to establish whether staff were able to undertake their substantive role remotely and, where appropriate, a degree of role realignment was undertaken. These surveys revealed a series of digital inequalities between library colleagues, both professional and personal.

Many front of house, customer service, and collection-based staff, for example, were unlikely to have extensive, or any, experience of working remotely. Their work was often of a physical, personal nature, or collection-based nature, and involved face-to-face interactions with users, the reshelving and movement of library stock, or the care and oversight of the collection. They were less likely to have experience of remote working than other colleagues, to have the hardware to do so, or to have received training on platforms to enable this. As a result of the nature of their substantive role, the transition to remote working was often more difficult for these colleagues and involved a greater degree of role realignment and upskilling on remote working platforms. The extent of role delineation varied between members, with one member reflecting that a matrix working structure meant that they did not have a dedicated customer service team, and that this reduced the significance of the transition to remote working.

These early surveys of staff roles and remote working capabilities also revealed the relatively unexpected issue that a minority of colleagues had no internet access at home (through choice), whereas a significant minority (particularly those in rural locations) had poor and unstable connections. The realisation of this during the transition to remote working revealed that issues of digital inequality stretched beyond library users and audiences, to include many staff also. Depending on their ability to complete their substantive role remotely, colleagues were sent internet dongles to enable stable connectivity to university systems. Where this was not possible, colleagues took steps to mitigate the worst impacts of poor connectivity (e.g. by joining virtual meetings without their video).

8 The degree to which this was possible has been explored in a separate RLUK report regarding the impact of Covid-19 on RLUK member libraries, see M. Greenhall, The initial responses of RLUK member libraries to the Covid-19 crisis (March 2020): https://www.rluk.ac.uk/report-the-initial-responses-of-rluk-member-libraries-to-the-covid-19-crisis/
Even those colleagues with relatively strong and stable internet connections often experienced connectivity issues due to other family members needing to be connected to the internet during working hours. These experiences reiterated the importance of recognising personal and professional circumstances in relation to remote working. The lack of connectivity for those colleagues without any internet connection appears to have come as a surprise to a number of member libraries. This may reflect the uneven experience of remote working prior to the lockdown, with this being most prevalent amongst senior teams within some libraries, thereby obscuring wider connectivity issues amongst colleagues. The inability of some staff to work from home raised questions about how member libraries, and their wider institutions, might mitigate the impact of future lockdowns and enable all of their staff to work remotely.

**COLLECTIONS**

In addition to identifying the hardware, software, and connectivity needs of colleagues, immediately prior to lockdown members were also actively engaged in securing the collection. This included the physical removal of collections from display (when time allowed) and from staff workspaces (e.g. conservation). It also included making contingency plans regarding the non-availability of physical collections, whether through the targeted digitisation of content or through the scanning of essential and high use print stock under such mechanisms as the CLA license.

Due to the rapidity of events, libraries were not able to take full advantage of such options before lockdown was imposed. The limited relaxation of restrictions on the CLA license also came after RLUK member libraries had closed and thus they were unable to take greater advantage of this. In addition to scanning and digitising content, a number of libraries reported that members of their cataloguing teams were able to take photos of the bibliographic information of uncatalogued stock to enable this to happen remotely.

**COVID-19 AS CATALYST**

One of the most consistent reflections on behalf of members was the extent to which the Covid-19 crisis acted as a catalyst for the implementation and roll out of platforms to support remote working, with MS Teams and Office 365 being notable amongst these. Many institutions were engaged in roll-out programmes before the Covid-19 crisis and, whereas original timescales stretched over months and even years, the arrival of the Covid-19 crisis and the need for remote working saw system rollouts greatly hastened. The transition to remote working challenged long-held assumptions regarding which roles and tasks could be completed remotely, and the suitability of technology to support these.

As a result, an overarching reflection amongst RLUK members is that Covid-19 has acted as a catalyst for new ways of working, as well as systems which were previously envisaged but not yet implemented. This is a reflection shared by both RLUK’s interviewees and those colleagues who completed RLUK’s survey on the digital shift, with 61% of the survey’s 336 respondents reporting that Covid-19 had acted as a catalyst for change and that it had ‘encouraged or embedded pre-existing ways of working, at a faster pace’.

This has applied to the rollout of individual systems, but also the prioritisation of projects, particularly those enabling the access and use of digital collections, and the provision of online teaching content.

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10 Results from RLUK’s Digital Shift manifesto mentimeter, the quantitative and qualitative results of RLUK’s digital shift survey are available at: www.rluk.ac.uk/digital-shift-manifesto-launch [accessed on 15.06.20].
COVID-19 AND THE DIGITAL SHIFT IN ACTION

RLUK members were able to ensure a degree of remote working before or shortly after the closure of their physical building, despite the rapidity of events and difficulties in planning. There were multiple variables in determining individual institutional experiences, including the familiarity of staff with remote working, the close working relationship with IT, and the pre-existence of flexible working policies. Covid-19 acted as a catalyst within RLUK members and hastened the implementation and embedding of systems and ways of working which were already being considered or rolled out.

The crisis provided members with an opportunity: to work in new ways, to question established ways of working, and to challenge the perception of the library and its role within the institution. The latter has been revealed as particularly important. Debates regarding the need to keep library buildings open to guarantee access to services during the days immediately preceding lockdown highlighted that there is a need for renewed advocacy around the library’s digital collections and services. In support of these, the crisis has also emphasised the importance of digital skills and literacy amongst staff, and the need and benefits of agile and flexible ways of working. These issues have been reaffirmed by the actual experience of working remotely.

"The crisis provided members with an opportunity: to work in new ways, to question established ways of working, and to challenge the perception of the library and its role within the institution."
SKILLS AND LEADERSHIP
The experience of working remotely

KEY POINTS

- **Skills and training:** members worked to upskill colleagues around digital platforms and processes during lockdown.
- **New ways of working:** colleagues and teams adapted well to remote working, with methods and approaches to online working maturing during the period of lockdown.
- **Perception of the library:** lockdown provided an opportunity to challenge and recast perceptions of the library through the promotion and diversification of its digital services and collections.
- **Pedagogical change:** the shift to online learning and the dependence on e-content led to pedagogical changes and these may have medium- and long-term implications.
- **Opportunity:** the experience of working remotely and offering services online provided an opportunity for the library to work in different ways, to ‘reboot’ its relationship with members of the academic community, and challenge perceptions of itself within its institution.

OVERVIEW

Following the physical closure of libraries in mid-March, RLUK members transitioned to fully digital and online operations. Although achieved at a rapid pace, members reported that this transition was largely a smooth one and led to significant changes in how the library worked, how it was perceived within its institution, and how it was likely to work in the future. As seen during the initial transition to remote working, Covid-19 acted as a catalyst for change within member institutions in terms of the ways they worked and the provision of access to collections.

Members reported that it provided opportunities to reboot their relationship with individual academics, to take more of an active role in designing and delivering curriculum content, and to challenge perceptions of the library. The experience of lockdown also tested libraries’ digital resilience and infrastructure, and it exposed areas for staff development. In doing so, the experience of working remotely enabled members to undertake a comprehensive, if somewhat hastened, audit of their digital infrastructure, the agility of their systems, and digital competencies and capacity of their staff. It also led to a more deep-rooted consideration of the role of the digital, its relation to the physical, and capability of the UK’s digital research infrastructure.

WAYS OF WORKING REMOTELY

Working remotely, for many colleagues, represented a major change in working style and was often something they had not done before. This posed practical problems in terms of accessibility to hardware and software, but also challenges around ways of working and communication in particular. The adoption and use of platforms such as MS Teams, Office 365, Sharepoint, and Zoom have been one of the most prevalent experiences of members throughout the lockdown period. Many colleagues praised the rollout of these systems and their ability to maintain good communication between teams and underpin business continuity.
Colleagues have also reflected that the lockdown period witnessed the gradual adaption and transition of working styles. Initially, a number of members reported the attempt to ‘calendar shift’, that is the attempt to duplicate physical calendars, digitally. The intensity of digital meetings was a consistent comment and, as a result, working patterns began to adapt to digital platforms as the lockdown continued. Colleagues lamented the loss of ‘water cooler’ conversations and the difficulties they had in trying to replicate spontaneous social interactions between colleagues virtually. This varied from the holding of online quizzes and social events to ‘virtual coffee breaks’ in order to try and replicate some of the more informal interactions between colleagues, and especially across teams.

The important role such informal interactions had in cutting across team units and working silos was noted by RLUK’s larger members, whereas the loss of communal office spaces was a much-missed element of working practices for others. The shifting nature of working patterns, and the utilisation of remote working platforms to enable both official and informal communications demonstrated a growing maturity and confidence in remote and online working, and that this no longer represented an attempt to replicate physical work environs digitally, but rather a new working pattern in its own right.

**TRAINING, ONLINE LEARNING, AND PEDAGOGICAL CHANGE**

Enhanced levels of staff training and development were integral to supporting the smooth transition to remote working and reflected the need to train staff in remote working and in the use of particular systems, and the opportunity to develop staff digital competencies whilst role realignment was being undertaken. The initial weeks of lockdown therefore provided an opportunity for colleagues to explore and further develop their own digital skills and capabilities, at their own pace, something that was commented upon by a number of member libraries during interviews.

“One member reported an increase of over 300% in visits to its research skills pages in April compared to the previous month.”

In addition to supporting their own staff, RLUK members worked to support online learning across their wider institutions. This included offering support to academics and students around online teaching and learning, and the accessibility and use of digital content. The popularity of these sessions, especially amongst academic staff and postgraduates, was notable. One member, for example, reported that more academic staff had attended just two of the library’s digital learning sessions during lockdown than had attended all of its sessions during the previous year. In addition to research- and learning-orientated training, those RLUK members that are in a converged service with IT departments reported offering more technical training in the use of online platforms and individual systems (e.g. Zoom training), further increasing the reach and visibility of the library’s training offer.

Members also reported that the lockdown had provided both the opportunity and impetus to review and develop their online-learning and skills content further. Within one member, colleagues working within special collections created a series of video skills guides, whereas other colleagues used the lockdown period to test various online learning and streaming platforms. The development and delivery of training, across the full breadth of the institution’s subject base, enhanced the library’s visibility as a home of training, learning, and skills development and, in doing so, further challenged notions of the library and its work amongst some academic users in particular. In addition to onscreen and virtual training, members also reported large increases in visits to library webpages containing research guidance. One member reported, for example, an increase of over 300% in visits to its research skills pages in April compared to the previous month, which further highlighted the library’s role in teaching, research, and learning support.
The library’s work in support of academic colleagues and postgraduates went beyond the provision of digital skills and research training content and has included the support of online teaching. Members noted the enormity of the transition to online learning within their institution, the significance of the library’s role in supporting this, and that this provided them with an opportunity to ‘reboot’ the library’s relationship with its institution’s academics. Members worked closely with academic colleagues to create new online learning content and to repurpose that already available. This was not only in response to the initial lockdown, but also in preparation for forthcoming sessions and the movement of the institution’s teaching online for the foreseeable future. This also included the compilation of lists of material for priority digitisation once access was allowed back into library buildings and the co-creation of content. Members also explored the creation of virtual search rooms and classrooms, and these will be described in greater detail in the following section. The library worked closely with academic colleagues in the role of co-creator of online learning materials, whether in response to the initial transition to online teaching or in planning for the Autumn term. This represented a significant transition in the library-academic relationship for some members.

ENHANCED DIGITAL PRESENCE

The roll out of online learning, research, and teaching resources by the library during the lockdown depended on its ability to communicate its digital offer. Many members worked to optimise and build upon their strong digital presence within their institution during the lockdown period, to promote this more effectively, and to build a definitive digital or virtual library brand. This has included the rebranding of the library’s webpages as a virtual library and the proactive promotion of the library’s digital resources. As a result of this, many members witnessed a significant increase in the use of their digital resources and a recognition of the breadth and variety of digital resources offered by the library.
SUMMARY

RLUK member libraries worked quickly to transition their operations and services online during the period that surrounded lockdown. In addition to providing access to the necessary hardware and software, staff development and training was an essential element to the transition to remote working. Lockdown provided the opportunity to re-evaluate the digital skills and competencies of colleagues and provide opportunities for these to be developed through self-led learning.

Although all member libraries have a commitment to staff training and development, and programmes to support these, the transition to remote working witnessed a greater intensity and diversification of the online training. The focus on staff digital skills development supported the transition to remote working and was particularly important for those colleagues that were initially unable to undertake their substantive role remotely.

“The library was able to demonstrate a range of roles confidently, of provider of online training content, as a partner in the development of online learning materials, and as a pioneer in training delivery and skills development.”

The widespread training of staff on new platforms or digital techniques has paid dividends during the longer lockdown period, allowing staff to be realigned to other areas of need more efficiently and effectively than otherwise might have been the case. These activities have supported the transition from transactional ways of working to more creative work during the lockdown period, whilst enabling the adoption of more flexible working practices; two elements which underpin the vision of the RLUK manifesto for the digital shift.11

The lockdown provided the opportunity for the library to enhance and further showcase its role as a home of training and skills development, and the important role it can play in wider pedagogical change and the transition to online learning. As a result, the library was able to demonstrate a range of roles confidently, of provider of online training content, as a partner in the development of online learning materials, and as a pioneer in training delivery and skills development.12 The lockdown therefore afforded an opportunity to positively challenge perceptions of the library and its work within institutions, to reboot its relationship with individual academic colleagues, and to build the digital competencies and capacities of its staff.
SCHOLARSHIP AND COLLECTIONS
The relationship between the digital and physical

KEY POINTS

- **E-print and the value of print**: The lockdown has changed the perceived value of print collections, as member libraries have come to rely on e-print and digitised content. Although this has been a pragmatic response to the lockdown period, these experiences may have medium- to long-term implications.

- **Digital-physical dependency**: the closure of physical buildings has exposed the reliance of digital access to some collections and resources on physical access to buildings and spaces.

- **Digital-first dividend**: the pursuit of digital-first policies had increased e-content as a proportion of total library stock, but the size of this portion varies between RLUK members.

- **Resource realignment**: that we will see a resource shift within member libraries to the purchase of e-content, enhanced digitisation, and the development of the library’s own digital scholarship services, techniques, and capabilities. This will be against the general backdrop of budgetary contraction.

- **Copyright**: that the pandemic has reaffirmed significant challenges around the UK’s copyright law and also the application of exceptions during periods of lockdown.

- **E-print costs and licensing**: that the costs and restrictive licensing associated with e-print requires urgent change and will be unsustainable.

- **Unique and distinctive collections**: members worked to enhance the quantity and visibility of their digital collections, enabling their inclusion within online teaching and research, whilst further enhancing their widening participation and community engagement activities during lockdown.

OVERVIEW

One of the most significant impacts of the Covid-19 crisis and the closure of library buildings has been on how research library collections are used and viewed. The period of lockdown saw a significant increase in the use of e-print and much of the initial work during the lockdown supported this transition. It also exposed some of the dependencies between access to digital collections and access to physical library buildings and spaces. The impact that Covid-19 has had on collecting practices has also been explored in a separate report.13

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The closure of library buildings exposed a wider issue regarding the interdependence between digital access to collections and resources, and physical access to library spaces and infrastructure. The reasons for this interdependence were multiple and included legislative provisions, copyright and licensing requirements, and issues of sensitivity of material. As a result, there is no single remedy to loosen this interdependence of digital access on physical access, and members reflected that it would take considerable time and effort to unpick these.

**Legal deposit and web archive:** Once buildings closed, access could no longer be provided to non-print legal deposit amongst the legal deposit libraries, nor to the British Library web archive, due to restrictions placed on them by their associated legislative frameworks.

**Dedicated terminals:** Access could also no longer be given to some digital content due to the terms of their licenses (for commercially purchased material) and copyright restrictions (such as some in-copyright digitised materials), both of which can require content to be viewed via dedicated terminals within library buildings. This also applied to a number of databases, which due to their licensing, could only be viewed on dedicated terminals. Members had engaged with commercial providers in the early stages of lockdown to seek remote access to these collections, and had met resistance.

These restrictions, which cement the dependency of digital access on the physical access to spaces and terminals, exposed some of the weaknesses of the UK’s digital research infrastructure and the limitations within its copyright framework. The latter prohibited the creation of such resources seen elsewhere in response to the pandemic, such as the National Emergency Library in the United States, and there have been extensive discussions regarding the impact of the UK's copyright framework on the experience of libraries and higher-education institutions during the pandemic. Beyond licensing and copyright restrictions, access to some collections also ceased on grounds of sensitivity.

**Born-digital content:** a number of RLUK members have previously reported that access to born-digital content is provided via dedicated and secure terminals within search rooms.

**Sensitive data:** This included access to sensitive data via the ESRC supported Micro Safe Setting Network and access to born-digital content via secure terminals installed by a number of members within their search rooms.

Rethinking and loosening the digital dependency on physical access is one of the overarching lessons learnt from the transition to remote services. To do so will be complex due to the multifaceted reasons for why online access is not currently enabled for such content, whether due to copyright or licensing restrictions, or sensitivity.

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16 https://esrc.ukri.org/files/funding/funding-opportunities/micro-safe-settings-network-application-and-guidance-for-a-micro-safe-setting/ [accessed on 15.06.20]
E-PRINT AND THE PERCEIVED VALUE OF PRINT

One of the most marked impacts of the Covid-19 pandemic was how it has affected the relationship between print and e-print. On the point of lockdown, RLUK members ceased to purchase print stock for their libraries and efforts to catalogue new material therefore largely ceased. Members were also unable to continue scanning content under exceptions such as the CLA license and received digitised material through such routes as the British Library’s EHESS service, due to the inaccessibility of stock. Some limited cataloguing activities of print stock continued, based on photographs taken by cataloguing teams of bibliographic details of individual titles when departing library buildings, but this was piecemeal. In terms of the focus on collections, one of the most noticeable shifts was around the increase in demand for e-print.

As the lockdown began, demand for e-print increased significantly, with one member, who already had a digital-first policy and encouraged the use of e-print collections before the pandemic, reporting an increase of 550% in demand in April 2020 compared to that month the previous year. In response to the increased demand, RLUK members undertook significant resource realignment in terms of staff time around sourcing e-print alternatives to physical stock and cited the close engagement that this required with academic colleagues. This included the conducting of reading list surveys in the early stages of the lockdown and that a number of additional staff were diverted to this task.

Many of these surveys highlighted an unrealistically high number of titles which were identified as ‘essential’, particularly amongst the arts and humanities. Furthermore, a significant proportion of texts on reading lists were unavailable digitally. The conducting of these surveys and the identification of available e-resources provided valuable work for those colleagues who may not have initially been able to complete their substantive duties in lockdown.

Due to the timing of the lockdown, coming towards the end of the Easter term, particular urgency was attached to identifying electronic texts for pre-seen exam papers. With the end of the teaching term, members worked to support postgraduate and academic staff gain access to material for their ongoing research. There was particular concern regarding the ability of master’s and doctoral students to gain access to study material, and their inability to obtain items might lead to deferrals.

In terms of identifying available e-print, colleagues worked to search existing sources, in addition to those titles that were recently made freely available by publishers during the crisis. In doing so, library colleagues were careful to manage the expectations of academic colleagues regarding the availability of materials after the pandemic is over. The scale of resource realignment towards e-print also varied between members and depended on their previous policies.

DIGITAL-FIRST DIVIDEND

The majority of RLUK members had well-established digital first or e-preference purchasing policies in the years leading up to the pandemic. This related to the purchase and provision of electronic content in preference to print stock and resulted in both an increasing proportion of library stock being available electronically and an increasing awareness of the availability of e-print amongst academic colleagues.

Although RLUK members have pursued e-first policies, there was still a degree of variation across the membership regarding the significance of e-print as a proportion of library holdings. This related to the length of time e-first policies had been in place and also the subject focus of the institution, with e-print being particularly well-established within STEM subjects. Those members supporting large science and engineering curricula reported a relatively smooth transition to lockdown due to the pre-existing heavy reliance on e-content.
In addition to more content being made available, a number of members have also reflected that they have seen an increase in the volume of material being deposited by academics within open access repositories. One member noted a 32% increase in April 2020 compared to the previous month, reflecting that some academic colleagues were using the early stages of lockdown to complete publications.

E-PRINT ADVOCACY AND SPENDING

A number of members reflected that although the identification of e-resources and texts was initially a pragmatic response to the lockdown and the need to enable online learning, the increase in the use of e-print was likely to have medium- and long-term implications for pedagogy. In particular, the identification and classification of a large number of texts as ‘essential’ on reading lists was seen as unrealistic and the unavailability of print stock provided an opportunity to work with academics in the construction of hybrid reading lists ahead of the autumn term.

The promotion of the library’s existing e-content, and the sourcing of alternatives to print stock when e-print versions were available, further highlighted the library’s role as a supplier of digital content.

As a result of these changes, members expected that there would be a heightened need for investment in e-resources, both for research and also teaching. In regard to the latter, members expected that the purchase of e-textbooks would continue to increase significantly ahead of the autumn term of 2020. The need to invest in e-print materials would become more acute following the end of free-trial periods offered by many publishers, and the expectations of academic and student users would need to be continually managed regarding the availability of these materials.

These reflections confirmed the shift already occurring within members of investing more heavily in e-print but, in the future, these will be set against the backdrop of overall budgetary contraction. As a result, members will look to maximise the impact of their budgetary spend on content which will include an assertive assessment of the value of big deal spending. It will also include challenging the restrictive licensing and the high-cost of e-print materials with publishers, something that is likely to receive senior support from university leaders against a backdrop of financial contraction and restraint.\(^{17}\)

UNIQUE AND DISTINCTIVE COLLECTIONS

Colleagues responsible for unique and distinctive collections worked quickly to maximise the digital content available from their collections to support online teaching and research. This included the prioritised uploading of pre-digitised content to online access systems during the early stages of lockdown, with metadata teams subsequently working hard to attach the relevant metadata standards. There was also an increase in the purchasing of commercially-available Digital Archival Collections, something hastened by the lockdown, and their promotion and use within teaching.

This greater use of the resources has provided a valuable opportunity to better understand how digital content might be incorporated within teaching in the future. Members reported that they were proactively working with academic colleagues to identify material required for online teaching for priority digitisation, once they were able to re-enter their library buildings, and had been working to maximise the impact and accessibility of this content.

In addition to supporting teaching and learning within their institutions, colleagues reflected that they had quickly enhanced their digital offer to local schools, colleges, and members of the community. This included working with teachers to support online teaching, the provision of access to digitised materials

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\(^{17}\) Some of the fundamental issues concerning e-print licensing and costs are explored in https://www.rluk.ac.uk/a-framework-for-thinking-about-the-new-normal/
within lessons, and the further development of their curated online presence (through online exhibitions and videos). Members also used crowdsourcing to support wider community engagement with collections during the lockdown, and noted an increase in the use of MOOCs (Massive Open Online Courses), and that additional course content was added as the lockdown progressed. The promotion and further development of online courses and crowd-sourcing initiatives were important, both in highlighting the collections held by the institution, but also in combating loneliness and social isolation amongst communities during the lockdown period. These activities came alongside a well-developed social media profile, which continuously highlighted the collections and resources available, and encouraged users to respond and interact with these in light of their own experiences.

“The promotion and further development of online courses and crowd-sourcing initiatives were important, both in highlighting the collections held by the institution, but also in combating loneliness and social isolation amongst communities during the lockdown period.”

SUMMARY

The physical closure of library buildings represented a significant change for RLUK member libraries. The experience of closure had challenged established ways of working, how users thought about and interacted with library collections, and their perceptions of the library. In doing so, Covid-19 acted as a catalyst and accelerated change in many processes and ways of working, which have long been considered or planned, but haven’t been enacted. The lockdown also exposed the vulnerabilities of portions of the UK’s digital infrastructure, in particular the dependency of access to some digital collections on access to physical spaces and terminals. The legislative restrictions covering non-print legal deposit and copyright and licensing frameworks have proven restrictive during the lockdown period and have not enabled UK-based institutions to make such emergency access provisions as seen elsewhere (notably in the United States).

The experiences of RLUK members were not homogeneous and much depended on their previous, established ways of working. This included biases within their institutional curriculums (e.g. towards STEM), and their pursuit of e-first policies to their collections. The experience of a prolonged period of remote working presented the library with opportunities to reboot its relationship with many individual academics and to work collaboratively in identifying e-resources and co-curating online learning content. It has provided the opportunity to challenge existing perceptions of the library, and to advocate for its digital resources and the continued, and enhanced, investment in these.
PHYSICAL AND DIGITAL SPACES
Preparing to reopen and opportunities for new ways of working

KEY POINTS

- **Phased return**: member libraries are instituting a phased return and reopening of their buildings.
- **Hybrid**: members plan to adopt a hybrid and mixed model of digital and physical services, reflecting their experiences of the lockdown, and in order to mitigate the impact of future pandemics.
- **Working practices**: members envisage a major shift in working practices, especially in regard to flexible and remote working. The ability of colleagues to work remotely is likely to become an expectation.
- **Perception of the library**: there is an opportunity to challenge and recast perceptions of the library through the promotion and diversification of its digital services and collections.

PLANS FOR REOPENING

Across May and June 2020, RLUK members began to put a series of plans in place to enable the partial and incremental reopening of their library buildings as lockdown restrictions were relaxed. Different timelines were adopted regarding the reopening of buildings across the RLUK membership, reflecting variations in the national timelines outlined by the UK government for England and the respective devolved administrations in Scotland, Wales, and Northern Ireland. The reopening of Trinity College Dublin was determined by the timeline for recovery established by the Republic of Ireland’s government.

![Figure 2: Which of the following best describes your library’s approach to reopening in the post/continuing Covid-19 landscape? (60 responses received, poll open 29 May - 3 June 2020)]
All of the RLUK members interviewed reflected that they intended to implement an incremental reopening of their library buildings, something reiterated on the RLUK member communication lists and during network meetings. This included the offering of limited onsite services such as a click-and-collect functions to enable students and researchers to access physical print stock, and the eventual reopening of study spaces following their reconfiguration to allow for social distancing. Members noted that the ensuring of social distancing would severely limit their onsite capacity (in some instances limiting this to 15-25% of their full capacity), and that it would be some time before users would be allowed to make use of study spaces.

This incremental approach was confirmed by the results of a Mentimeter survey of the members of IARLA (International Alliance of Research Library Associations), where 65% of its 60 respondents stated that they intended to undertake a phased reopening of their libraries, based on the ongoing assessment of risk. This included the offering of click-and-collect and digitisation on demand services, limited access to some library spaces for research (e.g. archives and special collections), and only the gradual reopening of wider study and communal spaces.

The relationship between digital and physical services

This blended approach to reopening represents a pragmatic response to the possibility of further waves of infection, incorporates many of the lessons learnt from the experience of lockdown, and may also lead to more significant changes in the relationship between the physical and digital. This includes ensuring that, wherever possible, there is a seamless merger between physical and digital services, and that the library has the ability to move between these with relative ease (termed by some members as the ‘digital pivot’).

What has been emphasised is that this should not represent the replication of physical services within a digital form but should build on member experiences during the lockdown and look for the connection between these. In order to support this, members have reflected that they expect a significant degree of resource realignment in support of e-content and services, digitisation, digital scholarship, and staff development.

The adoption of a hybrid approach to research library services and collections will have an impact upon the infrastructure and spatial appearance of RLUK libraries. This includes the creation of hybrid digital spaces and the reconfiguration of physical spaces.

**Virtual search rooms**: one of the most tangible examples of the creation of a hybrid approach to reopening is the creation of virtual search rooms. A number of members have shown a desire to provide digital access to unique and distinctive materials that does not depend on digitisation. One model suggested is the creation of virtual search rooms, which involve the live streaming of archive and special collection content to individual remote users via high-quality and secure video link. Remote readers will be able to interact with search room staff, including to request that they turn individual pages as required. Although this will be staff intensive, and also requires investment in hardware, it does enable user-responsive digital access to collections. Such initiatives are both in response to the need for social distancing within library spaces, but also the inability of researchers from outside of the locality to travel to consult material.

**Virtual classrooms**: a number of members are also planning to launch virtual classrooms, which will enable the live streaming of teaching and training content, both as a part of online teaching but also wider community engagement. In addition to supporting online learning within their own institution, members have also been actively supporting local schools and colleges with their online learning.

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18 Delegate responses to the question, “which of the following best describes your library’s approach to reopening in the post/continuing Covid-19 landscape?” The quantitative and qualitative results of the IARLA reopening survey are available at: [https://iarla.org/2020/06/recover-retrench-reset/](https://iarla.org/2020/06/recover-retrench-reset/) [accessed on 15.06.20]
teaching. This includes the incorporation of materials from archives, special collections, museum, and galleries into teaching, but also skills training more generally. One of the lessons learnt from the lockdown has been the potential reach of the library’s virtual training offer and the significant role that library colleagues can play in the formulation of online teaching within and beyond the institution.

**Digital scholarship:** one member reflected on the need to create a virtual and online presence for the library’s digital maker space, which would include an enhanced web presence and the availability of some tools and functionality online. Other members reiterated the need to offer greater online accessibility to digital scholarship tools and techniques to allow for the greater full exploitation of the library’s digital collections.

**Exhibitions:** members have also cited their desire to move exhibition and curated content online. Although many exhibitions have, for some time, had a digital presence, members have reflected that these often represented only a partial reflection of the physical exhibition. A number of colleagues, particularly working within archives and special collections, have reflected on the importance of investing more heavily in online exhibitions as a result of the experience of lockdown, whilst also better capturing the impact of their online activities.

Throughout the lockdown period, and in preparation for recovery, members have examined the pragmatic steps that can be taken to provide greater access to digital content and services. These developments aim to meet a pragmatic need of providing digital access to content and functions that have previously only been available physically. They are also a part of a wider discussion of the role of the library building and its spaces in the delivery of online services and content.

> “[A] blended approach to reopening represents a pragmatic response to the possibility of further waves of infection, incorporates many of the lessons learnt from the experience of lockdown, and may also lead to more significant changes in the relationship between the physical and digital.”

**WORKING PRACTICES**

Due to the incremental nature of reopening, and with the risk of successive waves of infection, members reported that they expect remote working to continue for the foreseeable future. Many reflected that they hoped that the experience of the Covid-19 crisis and the adoption of flexible working practices would bring lasting change to their organisations. In particular, many hoped that the working culture of recognising personal circumstances (e.g. childcare responsibilities) would continue and that more flexible working patterns would be maintained. Members repeatedly stressed in interviews that working practices should not simply revert to those before the Covid-19 pandemic, and that there was a real opportunity to re-evaluate how individual roles are undertaken and how these related to the physical library building and its spaces.
THE PERCEIVED ROLE OF THE LIBRARY

The work of RLUK member libraries during the lockdown period has challenged many pre-existing notions of the library. Particular emphasis has been placed on the library’s ability to provide access to collections and services remotely, the strength and resilience of its digital services, and the broad expertise of its staff. Members have also cited the significance of the library as the 'labs' and places for experimentation for the arts, humanities, and social sciences, both onsite and online, during discussions surrounding reopening.

Yet despite the strength and success of the library’s digital services, a number of members have reported that perceptions of the library, as predominately a physical space and service, have sometimes persisted. As was the case during the initial lockdown period, the library building itself continues to have iconic status as a 'campus citadel' within some universities, and as a 'cultural citadel' within the cityscape.19

The library building, therefore, is sometimes seen as a ‘barometer’ of recovery, a tangible and visible sign that things are ‘returning to normal’ on campus. One of the lessons learnt from the Covid-19 crisis has been the need to strengthen the library’s advocacy for its digital services and capabilities, and to use the experience of the lockdown to demonstrate the strength of these.

SUMMARY

The experience of lockdown and the plans for the reopening of library buildings have witnessed a reimagining of the relationship between the library’s physical and digital services, operations, and spaces. The blending of physical and digital via hybrid services is expected to remain for the foreseeable future, as library spaces are opened incrementally, and with the ongoing risk of successive waves of infection. The ability of libraries to operate against the backdrop of continuing uncertainty reiterates the need for flexible and adaptive structures and working patterns, and the continued development of staff skills and competencies. It also underlines the need for wider changes within the scholarly and publishing landscape to enable scalable and sustainable online learning.

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19 See RLUK’s report, *The initial responses of RLUK member libraries to the Covid-19 crisis* (March 2020)
MOVING FORWARD
Lessons learnt from the Covid-19 crisis and RLUK’s digital shift manifesto

KEY POINTS

- **Licensing and cost of e-content:** there is an urgent need to reform the way that e-print is priced and licensed.
- **Copyright:** there’s a need for collective discussion around the reform of copyright frameworks to further support online learning and digital content.
- **Shift to digital:** there needs to be enhanced investment in digital content and resources, especially e-print and e-textbooks in particular. Efforts around the digitisation of collections should be enhanced and greater use made of Open Educational Resources where possible.
- **Skills and training:** there’s a need to continue to develop the digital skills and competencies of staff, reflecting the need for hybrid working in the medium- and long-term.
- **Digital infrastructure:** there needs to be an enhanced emphasis and investment in digital infrastructure and to break the digital-physical dependences of access.
- **Working practices:** there is an opportunity for a shift in working practices in the medium and long term.
- **Advocacy for digital:** that libraries should enhance their advocacy of their digital collections, services, and skills, and use the recent experience of the lockdown as evidence of these and their need for continued development.

OVERVIEW

The experience of the Covid-19 crisis has provided an invaluable insight into the digital capabilities of RLUK members, their wider institutions, and the UK’s digital research infrastructure as a whole. It has revealed a series of valuable lessons regarding the ability of colleagues to conduct their jobs remotely and the capacity of organisations to adapt to a rapidly developing and unprecedented situation, as well as an opportunity to consider the fundamental relationship between physical and digital spaces, collections, and services. The medium- and long-term impact of the Covid-19 crisis has yet to fully emerge, but following their experiences of lockdown, and in preparation for the reopening of their libraries, RLUK members have been actively considering lessons learnt and working practices that might be retained following the return to a ‘new normal’.

These experiences have reaffirmed the pertinence of the contents of RLUK’s manifesto for the digital shift in research libraries. The issues of skills and leadership, stakeholder engagement and advocacy, the merger of physical and digital spaces, and the changing nature of scholarship and collections, all sit at the heart of the manifesto and have defined member experiences during the pandemic. Yet the experience of the Covid-19 crisis has exposed significant barriers to the continued advance and acceleration of the digital shift within research libraries. This final section will highlight a number of areas for action and how these relate to the contents of RLUK’s manifesto and its associated programme of work. It will also include a list of actions to be taken forward by RLUK in order to support its members, including some from the manifesto’s delivery plan.

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20 www.rluk.ac.uk/digital-shift-manifesto [accessed 15.06.20].
21 RLUK’s manifesto for the digital shift in research libraries, and its associated delivery plan, is available at: www.rluk.ac.uk/digital-shift-manifesto [accessed 23.06.20].
Throughout this research, RLUK members have cited the need to urgently revise the cost and licensing models for e-print. Members expect a significant realignment of resourcing towards e-print in the medium-term and towards e-textbooks in particular. This is especially the case for the humanities, where there is an opportunity to work with academic colleagues to encourage and support the greater use of e-print, especially following the end of free-trial periods from publishers.

This will require continued advocacy regarding the use of e-print and a demonstration of the value of the digital shift to library users and institutional leaders. It will also require the challenging of publishers regarding the costs of e-content and their licensing models, which are currently unrealistically expensive and inflexible. Although these issues have long been recognised amongst libraries before the Covid-19 crisis, the experience of lockdown, the need for enhanced access to electronic materials in the coming months and years, and the contraction of library budgets, have all thrown the inequity and inadequacy of the current system into sharp contrast. The combination of these factors provides the enhanced impetus and evidence for significant change in the cost and licensing of e-print. These efforts will be most effective if done at a collective and consortial level.

In response to these costs and restrictions, members have cited the need to embrace Open Educational Resources where possible, and to increase the variety of e-content used within teaching. This can extend to the enhanced discovery and greater use of materials held in institutional repositories.

**Action:** members of RLUK’s Collection Strategy Network will continue to explore collective action around e-content, whilst RLUK will use its influence and stakeholder relations to represent the interests of its member nationally and internationally. RLUK will advocate for fair and transparent pricing for e-content, drawing on its member experiences, and will continue to call for reform of restrictive licensing agreements.

### ACTION AROUND COPYRIGHT

As is the case regarding licensing, the recent experience of lockdown has also exposed the inadequacies of elements of the UK’s copyright legislation and framework. The closure of library buildings, the inaccessibility of print content, and the wholesale transition to online learning has provided the context for a series of discussions regarding the UK’s copyright regime.

Many of these have focused on the need to support online and remote learning, around which RLUK wrote to ministers during the early stages of the crisis to request flexibility under the UK’s copyright regime.

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22 Some of the fundamental issues concerning e-print licensing and costs are explored in https://www.rluk.ac.uk/a-framework-for-thinking-about-the-new-normal/

23 These are sentiments shared beyond the RLUK membership: Clare McCluskey-Dean, University of York St John, ‘Lobbying for fairer ebook access’, Blog (12 May 2020) https://blog.yorksj.ac.uk/infoincurriculum/2020/05/12/lobbying-for-fairer-ebook-access/ [accessed 23.06.20].

24 For a further discussion of the likely impact of the coronavirus pandemic on research library budgets (as of May 2020), see M. Greenhall, Covid-19 and its implications for research library staffing and budgets (May, 2020) available to RLUK members only.


26 RLUK’s letter to ministers and their response, can be found here: https://www.rluk.ac.uk/letter-to-ministers-copyright-and-enabling-remote-learning-and-research-during-the-covid-19-crisis/ [accessed 15.06.20].
In addition to supporting online learning, discussions have also focused on the inability of the UK’s copyright regime to enable initiatives such as the National Emergency Library in the United States, and the limits it places on access to non-print legal deposit.

**Action:** RLUK, with key sector partners and stakeholders, will continue to advocate on behalf of its members to enable copyright reform. This includes continuing to lobby ministers, engaging in sector wide discussions regarding the tangible steps that might be taken, and ensuring that these issues are reflected in the manifesto’s delivery plan.

Members have cited the need to take a more strategic approach to digitisation. The reliance on digitised content during lockdown has reaffirmed that much of this digitised material has been the product of individual projects and still only represents a small portion of overall collections. Members have reiterated that there is a need for a more strategic approach to be taken to digitisation, especially between institutions, and that this should be driven and incorporated more effectively within online teaching content. The creation of virtual classrooms will be an important element of this.

**Action:** RLUK will continue to support efforts to develop collaborative approaches to digitisation through its membership of Jisc’s Digital Archival Collections working group, the work of its Special Collections Leadership Network, and through its facilitation of cross-sector collaboration in partnership with key stakeholders.

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27 The impact that Covid-19 has had on some of the collecting practices of RLUK members during the Covid-19 crisis have been explored in a separate report C. Kamposiori, *Collecting Covid-19: An RLUK Report on contemporary collecting* (June 2020).
COVID-19 AND THE DIGITAL SHIFT IN ACTION

DIGITAL SCHOLARSHIP

Respondents have also highlighted the importance of digital scholarship training and the further development of DS processes and techniques within member libraries. The ability of RLUK members to interrogate and apply DS processes and techniques to the collections they hold has been highlighted during the lockdown. A number of respondents commented that the development of digital scholarship skills and capacity amongst colleagues should no longer be seen as a 'nicety' but should be viewed as essential in utilising the full potential of digital collections. The further embedding of digital scholarship within the life of research libraries and the development of skills and capacity around its processes and tools are key interests of RLUK’s digital scholarship network.

**Action:** RLUK’s Digital Scholarship Network will continue to provide a forum for knowledge exchange and collective action between members.

**Action:** RLUK will investigate the creation of a digital scholarship skills and training programme, across the summer and autumn of 2020, for the benefit of its members and the wider research library community.

SKILLS DEVELOPMENT

The continued development of staff skills and competencies have been cited as areas for renewed investment following the end of lockdown, both in response to the experience of the pandemic, but also in preparation for the possibility of future periods of lockdown.

15% of responses to RLUK’s digital shift poll cited that the digital skills and competencies of staff should be prioritised, compared to only 5% of responses that suggested the same for academic colleagues. The investment of time and resources in developing digital capacity and competencies through staff training is seen as essential, and there is a need to raise the bar of digital skills acquisition amongst library staff. This is especially the case in relation to online and virtual learning environments, alongside digital scholarship techniques. It was in relation to skills and training that many members cited the ambitions of RLUK’s manifesto for the digital shift in research libraries, and the need for consortial activity around this.

**Action:** RLUK will undertake a skills audit from across the RLUK membership to identify capacity gaps [manifesto delivery plan].

**Action:** RLUK will package existing tools and resources to address skills gaps and to enable signposting to materials available [manifesto delivery plan].

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28 Written response to RLUK digital shift mentimeter survey, Q4.1: Any other areas where Covid-19 has exposed the greatest need for change? Full results are available here: www.rluk.ac.uk/digital-shift-manifesto-launch.

29 Figure 3: Around which areas has Covid-19 exposed the greatest need for change (select three) [323 responses received, poll open between 15-18 May 2020].
COVID-19 AND THE DIGITAL SHIFT IN ACTION

WAYS OF WORKING

The experience of working remotely during the lockdown has revealed the possibility of completing many tasks without the need to be onsite. The potential of remote working and communication between colleagues has been one of the key outcomes of the lockdown, and members have reiterated their desire to maintain a degree of flexible working in the future. The combination of personal and professional circumstances has again been cited, and that flexible working has enabled the acknowledgement and support of colleagues’ individual circumstances in a way that had not been done previously. Members have cited the need to ensure that institutional infrastructure can meet the demands of hybrid working and that greater attention be paid to issues of digital inequality amongst both staff and users.

**Action:** RLUK will work to develop the digital leadership skills of its members and will develop a sustainable channel to enable libraries to collaborate and share best practice [manifesto delivery plan].

**Action:** RLUK, working with its networks and working groups, will create a strategic workforce plan based on the results of its skills audiences and stakeholder mapping exercises, and that this should reflect the lessons learnt and emerging impact of the Covid-19 crisis [manifesto delivery plan].

ADVOCACY FOR THE DIGITAL

Members have cited the need for more effective advocacy around their digital collections and services, to raise awareness of these amongst users and non-users alike, and enhance the visibility and impact of these resources. Members have used the lockdown period to better understand how users might interact with digital collections and services and have gathered extensive metrics regarding their use. This information will be an important element in their future advocacy around the potential value and significance of digital collections and resources, and the need to develop these further.

**Action:** using its manifesto for the digital shift as a springboard, RLUK will work with its members and stakeholders to promote the digital collections, services, and expertise of research libraries.

**Action:** RLUK will undertake a mapping exercise to identify key external stakeholders from outside the research library community with which to work in order to enhance the aims of the manifesto and the visibility of the work of its members [manifesto delivery plan].
ROLE OF RLUK

This report has been produced in order to provide a summary of member experiences during a period of unprecedented change, to contextualise the contents of RLUK’s digital shift manifesto against the experience of members, and to enable further debate and discussion amongst RLUK members and the wider research library community regarding ways of enhancing the digital shift and embedding lessons learnt from the pandemic.

Figure 5: Following your experiences of Covid-19 which of the below should RLUK prioritise in the delivery of its manifesto in the next 2 years? (delegates were able to select up to 3 choices) [293 responses received, survey open 15-18 May 2020]

RLUK will continue to document the experience of its members during the ongoing recovery from the Covid-19 pandemic, to provide spaces for the sharing of knowledge and experience, and to actively and vocally advocate for change on behalf of its members to government and publishers. In response to the pandemic, members of RLUK’s digital shift working group will review the contents of the manifesto and reprioritising the contents of its delivery plan to better reflect the ongoing concerns of RLUK members during this time of change.

RLUK is also working with its international counterparts to enable knowledge exchange at an international level and to identify areas for tangible collaboration in response to the Covid-19 pandemic.
FURTHER READING AND USEFUL LINKS

RLUK Covid-19 reports
Greenhall, M., *The initial responses of RLUK member libraries to the Covid-19 crisis* (March 2020)
Greenhall, M., *Covid-19 and its implications for research library staffing and budgets* (May 2020) [unpublished: available within the RLUK members’ area]

Recordings of RLUK webinars [accessed 15.06.20]
Launch of RLUK’s manifesto for the digital shift in research libraries [recording of webinar and mentimeter results]: https://www.rluk.ac.uk/digital-shift-manifesto-launch/
Recover, Retrench, Reset: an international symposium exploring the reopening of research libraries and the ‘new normal’ in the Covid-19 landscape [recording of webinar and mentimeter results]: https://iarla.org/2020/06/recover-retrench-reset/

Useful websites depicting the current impact of Covid-19 on libraries [accessed 23.06.20]
Clare McCluskey-Dean, University of York St John, ‘Lobbying for fairer ebook access’, Blog (12 May) https://blog.yorksj.ac.uk/infoincurriculum/2020/05/12/lobbying-for-fairer-ebook-access/
APPENDICES

APPENDIX I

RLUK members interviewed to inform this report

One-hour interviews were undertaken with the following RLUK members:

- University of Exeter [17.04.20 and 24.04.20]
- University of Edinburgh [17.04.20 and 22.04.20]
- University of York [17.04.20 and 29.05.20]
- University of Durham [27.04.20]
- Imperial College London [28.04.20]
- Kings College London [28.04.20]
- Trinity College Dublin [01.05.20]
- Queen Mary, University of London [01.05.20]
- University of Manchester [14.05.20]
- University College London [19.05.20]
- National Library of Scotland [21.05.20]
- Royal Holloway, University of London [21.05.20]
- National Library of Wales [22.05.20]
- University of Leicester [22.05.20]
- University of Glasgow [26.05.20]
- The British Library [28.05.20]
- University of Reading [04.06.20]
Covid-19 and the digital shift: interview guidance

Thank you for agreeing to speak about your recent experiences of the Covid-19 crisis and the digital shift in library operations, collections, and audiences. This conversation will be led by a member of the RLUK Executive and will help inform RLUK’s work around the digital shift strand of its strategy, Reshaping Scholarship.

The digital shift in research libraries

The ‘digital shift’ is used as an umbrella term for the analogue-digital transition of many library services, operations, collections, and audience interactions. This work around the ‘digital shift’ forms part of RLUK’s current strategy, Reshaping Scholarship, and very broadly, relates to the impact of digital technology on research library:

Collections: reflecting the increasing volume of digital collections within research libraries, whether as born-digital archives, digitised content, data, research outputs contained within repositories, or electronic books and journals (e-print).

Operations: where an increasing portion and variety of library activities are delivered or enabled digitally, whether via remote access online or within the library itself, through resources such as digital scholarship labs, makers spaces or digital creativity hubs.

Connections: as the library’s own digital collections are diversifying, so are the collections scholars and students can access through the library.

Audience: that the digital shift provides opportunities for the research library’s audience to shift, grow and change, bringing more people into contact with the research library, in different ways, and for different purposes.

The changes occurring in each of these areas brings a variety of challenges and opportunities in relation to the library’s role in supporting and enabling scholarship, the skills contained within the library, its spaces, and its relationship with external stakeholders. These issues are explored further within RLUK’s digital shift manifesto and further information about RLUK’s work around the digital shift can be found on the RLUK website.

The digital shift and Covid-19

February, March, and April 2020 have witnessed an unprecedented transformation in the operations of the UK and Ireland’s research libraries. As the threat from Covid-19 increased, services were increasingly realigned as library buildings were physically closed. As a result of closure, this period saw the transition of operations, additional collections, and audience engagement online, at an unprecedented speed.

RLUK would like to capture the reflections and experiences of its member libraries through a series of structured conversations. These will be informal and conversational in nature, reflecting our recognition that using a prescriptive set of predetermined questions is unlikely to evoke the best responses or do justice to the variety of experiences of RLUK members. We would therefore like to structure our conversation around four broad categories and encourage a mix of specific responses and wider reflections. Notes will be taken during these conversations and these will be collated, anonymised (if requested), and will inform a forthcoming report summarising RLUK member experiences of the Covid-19 crisis.
The four areas that we would like to discuss relate to:

1) Incident response: physical closure and moving online
   During this section we can explore the experience of the library before its physical closure. What were some of the key issues encountered as the library began realigning its activities online, who were the key stakeholders in this process, and what incremental steps were made in planning for online operation? What were the growing implications for staff, users, ongoing projects, and collections?

2) Working remotely: delivering services and collections online
   What were some of the key challenges of working remotely and establishing a fully remote service (for staff, users, collections)? What has this required in terms of hardware, software, and skills? Which stakeholders have been important in this process and what has the library’s relationship with them been (e.g. IT)? How is the library measuring the impact of its activities?

3) Recovery: preparing to reopen and opportunities for new ways of working
   Has establishing an online and remote service offered any unexpected outcomes or ways of working? Do you expect any of these ways of working to continue after the library has physically reopened?

4) Reflections and responses: RLUK’s ‘manifesto for the digital shift in research libraries’
   Before this meeting colleagues are encouraged to familiarise themselves with the contents of RLUK’s Digital Shift manifesto (https://www.rluk.ac.uk/digital-shift-manifesto/). The conversation will end with an opportunity to reflect on the contents of the manifesto in light of your recent experiences of the digital shift.

We will also ask whether, in addition to the contents of the manifesto, there is any other things that RLUK might do to support its member in this area.

We would like to thank you, once again, for agreeing to speak with us during what is a very demanding time. Please do not hesitate to get in contact if you have any questions or would like to suggest other areas for conversation.

Matt Greenhall, Deputy Executive Director, RLUK