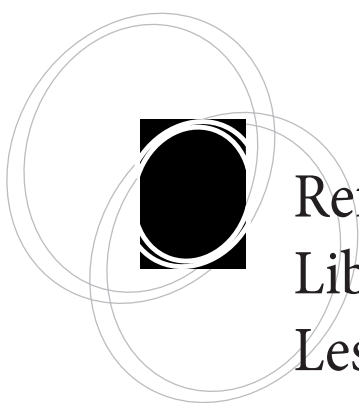## Editor's Note

In the summer of 2024, Clifford Lynch announced his retirement as executive director of the Coalition for Networked Information (CNI) after 28 years at its helm. CNI quietly launched a project to create this Festschrift to document and honor his legacy. Authors began contributing articles in early 2025, with a planned publication date of July 2025. Since the final membership meeting of Cliff's tenure was April 7–8 in Milwaukee, the plan was to surprise him, surrounded by colleagues and friends, with a presentation of the table of contents of this special issue. However, just two weeks prior to the meeting, Cliff's health worsened; he was told about the Festschrift and received project details and articles. Though unable to attend in person, he participated in the CNI membership meeting via Zoom and also virtually joined his retirement reception, which included readings of excerpts from each article in this volume. Sadly, on April 10, 2025, Clifford Lynch passed away. Festschrift contributors wrote their articles prior to his passing, and we have chosen not to alter their original language.

Reflections on Research Library Advocacy: Lessons Learned through Collaboration with Cliff Lynch

Judy Ruttenberg

abstract: Research libraries advocate for a complex set of federal policy issues that are rarely just about libraries. Our core issues—ensuring a balanced copyright regime, access to and accessibility of information, and privacy—are shared with civil society, technology companies, scholarly and professional societies, higher education, and research communities. Two key lessons I have learned in the five years I have led the public policy team at the Association of Research Libraries (ARL) include (1) the importance of consulting with and maintaining relationships with experts in science and technology, and (2) the necessity of understanding the impact of public policies on research institutions. Cliff Lynch has been an explainer, a partner in understanding complexity, a connector to experts, and an expert in his own right. The Coalition for Networked Information (CNI) community and the programming he has led consistently provide a wealth of stories and ground truth for how policy priorities can, should, and do impact the research enterprise.

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Introduction

In 2020, nearly 10 years into working at the Association of Research Libraries (ARL) as a program director for scholarly communications and other researcher-facing endeavors, I took on leadership of ARL's public policy portfolio. I became head

of a newly formed unit that combined advocacy and public policy with scholars and scholarship. The new unit, the Scholarship & Policy Team, was a natural combination for an organization of libraries deeply embedded in their institutions' research enterprise. Research institutions face growing demands from funders and policymakers to increase public access to the research outputs they produce and steward—demands that ARL libraries themselves have been instrumental in shaping and promoting. Our new team began to explicitly emphasize the association's role in bridging policy and practice. We worked to strengthen ARL's external relationships across higher education, civil society, scholarly and professional societies, and other research communities with whom we had overlapping policy priorities. We understood our mandate to address the intersection of evolving research policies, the maturing digital infrastructure of libraries, and the fundamental mission of providing equitable access to knowledge. Given this nexus, it was natural that I would often turn to Cliff Lynch for conversation and counsel.

Two key lessons I have learned about research library advocacy and public policy in my current position are (1) the critical importance of consulting with and maintaining strong relationships with experts in science and technology, and (2) the necessity of understanding and articulating how public policies impact research institutions. In reflecting on those lessons, it is impossible to overstate my reliance on and deep appreciation for Cliff. Cliff has been a consistent, invaluable, and generous resource—as an explainer of technical concepts in plain language, a partner in navigating complexity, and a connector to a vast network of experts. He provided clarifying guidance through our regular conversations, his perfectly timed book and article recommendations, and his historical accounts of pivotal moments in the digital transformation of scholarship. In my policy role, I came to view the Coalition for Networked Information (CNI) not just as a hub for collective innovation but also as a repository of stories and insights into how library practices intersect with broader research infrastructures. CNI's leadership and membership offered insights into the ways public policy priorities manifest and evolve within the dynamic, interconnected world of scholarly research.

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Throughout his tenure at CNI, Cliff provided crucial and indispensable thought leadership with respect to information policy. Cliff's participation and leadership in groups such as the National Academies (NAS) and the Board on Research Data and Information (BRDI) gave him a close-up view of the research and science policy environment in the United States and globally. He regularly brought this knowledge to the CNI membership, the ARL board, and the broader community through carefully curated programming made public on the web. Many people have remarked over the years that Cliff is

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wonderful at making sense of the moment and synthesizing information in real time—and he is regularly asked to play that summation role at the end of conferences. What has been more remarkable for me is Cliff's ability to identify early signals and drivers of change across the research, policymaking, and cultural heritage sectors. Cliff specializes in directing our collective attention to significant trends that will affect the impact, stewardship, and trustworthiness of networked scholarly information, and the capacity of institutions to fulfill that mission. I share just a few instances in which I have witnessed Cliff's foresight, expertise, and directed attention, leading to productive engagement and opportunities for the library community to shape and influence information policy.

Machine Learning and Artificial Intelligence

I first heard the term *deepfake*s from Cliff at an ARL Board meeting in 2018. (Wikipedia dates this term to late 2017, coined by a user on the social network Reddit.) At that ARL meeting, Cliff led a discussion of how AI might affect the cultural and scholarly record. He asked the board to consider what kind of provenance and authenticity verification would be necessary to safeguard that record from manipulation and falsehood. Notably, recorded minutes from that meeting quote Cliff speculating that deepfakes would become particularly problematic "in political campaigns in the very near future, and being able to identify what is real and what is not real is going to be a huge problem."[1] We saw credible and damaging manifestation of deepfakes in the 2024 U.S. presidential campaign. As a result, legislation has endeavored to mitigate the most harmful social effects of deep fakes with a private right of publicity.[2]

The library community weighed in on that legislation, both to call attention to how cultural memory institutions made positive use of AI and to flag concerns about free speech.[3] Finally, libraries and others in the balanced copyright movement pushed back on the constitutional challenges of Congress granting an intellectual property right in an individual's voice or visual likeness.[4]

Throughout 2023 and 2024, ARL and CNI were deeply engaged in thinking about AI's transformative potential for our sector. In the spring of 2023—six months or so after the public launch of ChatGPT, an artificial intelligence (AI) chatbot developed by OpenAI—an ARL library dean suggested that the association use scenario planning as a method for preparing for a range of plausible futures for the research and learning ecosystem heavily influenced by machine learning and AI. ARL had done scenario planning a decade earlier and had experience creating tools for individual institutions to use in planning, mindful of a range of potential futures that would impact them directly. Cliff immediately offered CNI's partnership in what became a richly consultative process and product, "ARL/CNI AI Scenarios: AI-Influenced Futures."[5] Created by a diverse task force with many contributions from the ARL and CNI communities, this document establishes and strengthens library thought leadership on a set of powerful technologies that pose vexing challenges to teaching, learning, and research and to publishing norms and practices. Cliff participated closely in the creating and editing of the scenarios, bringing a strong mix of technical and policy knowledge. The scenario project was also a financial partnership between ARL and CNI, one that will continue this year with a researcher in residence at ARL focused on AI.

Research Data Management and Stewardship

Cliff has been active in global, cross-sector, and even discipline-based conversations about research data stewardship for many years and has organized CNI programming to include experts in broad initiatives and local institutional activities. Working in groups such as the Board on Research Data and Information (BRDI) of the National Academies, the Committee on Data (CODATA) of the International Science Council, and the Research Data Alliance, he has given the research library community visibility and insight. Research libraries have collectively endeavored to shape policy, develop services, and align institutional approaches with chief information officers and senior research officers. Up to and including his plenary talk at the fall 2024 CNI meeting, Cliff has admonished the research sector that how much data to keep and for how long remain unanswered questions. The answers will be crucial to address in any successful strategy for data stewardship. There are diverse institutional stakes on the one hand and evolving disciplinary norms on the other. For data stewardship to advance science, a complicated ecosystem of generalist, institutional, and disciplinary repositories, curation services, persistent identifier registries, publishers, and more must interact with one another.

Costs, until recently, were scarcely understood. While research libraries have provided extensive institutional leadership on research data management and curation for decades, including repository development and consultation, the "how much and how long" questions need collective solutions and commitments. As a member of the National Academies ad hoc committee on forecasting costs for preserving, archiving, and promoting access to biomedical data, Cliff gave visibility to and promoted the methodological importance of the committee's work for research institutions and data beyond the biomedical sciences.[6] The National Library of Medicine (NLM), which funded this work as the steward of growing data stores in genomics and other fields, had a keen interest in forecasting costs to plan for long-term growth, service, and preservation. Building on the NAS model and others and in response to growing mandates by research funders to share data, ARL, along with the Data Curation Network (DCN) and participating libraries, have made enormous progress in researching and analyzing costs for institutions and researchers in making research data shareable and publicly accessible. The "Realities of Academic Data Sharing" research team has been invited to brief numerous federal agencies and institutional leaders on their findings, and of course, has found thoughtful and receptive audiences at CNI.[7]

Research Security

Another area where Cliff has influenced the library community with respect to complexity in research policy and practice has been in research security. This area lies at the nexus of industrial policy, intellectual property, technology, and geopolitics. Within research institutions, it sits prominently alongside—and sometimes in tension with—other challenging areas of compliance with federal regulations. As ARL's Scholarship & Policy Team endeavored to provide our membership with practical information on changing research

security policies, Cliff was an important partner. The ARL team worked with Cliff, as well as with colleagues at the Association of American Universities and EDUCAUSE. Since 2021, the team has produced issue briefs and brought experts to the membership to understand current rules and related cybersecurity practices in U.S. research institutions and federal agencies.[8] We anticipate this area will grow in importance for research library leaders, given the implications for data management, repository requirements, and balance with open science policies and practices.

In 2020, CNI held an Executive Roundtable on the strategic implications of what they called "Science Nationalism."[9] The roundtable report raised ongoing questions for the research community to consider about related shifts in scholarly publishing. The report contextualizes the growth of scholarly publishing output in China, for example, in both the changing global economics of open access publishing as well as research collaboration and global collections. Research libraries are responsible for maintaining technical and open science research infrastructure, licensing global scholarly content, and copyright consultation and advocacy. Library leaders will therefore continue to be important voices in research security as they work to assist their researchers in navigating a complex administrative, political, and compliance landscape.

Conclusion

These are just a few recent examples in which Cliff's knowledge influence guided the library community's ability to advance its interests in a shifting policy environment. To know Cliff is to know that his interests and depth of understanding are vast and include all manner of priorities for the cultural heritage sector. I could (and have) talked to Cliff about the business model for open monographs, discovery of museum collections, machine learning in archives and special collections, linked open data, digital humanities and much, much more.

Cliff's insights and ability to anticipate the ripple effects of policy changes on the broader scholarly ecosystem have been both a compass and a lifeline as I navigated my role at ARL. His thought leadership, grounded in a thorough understanding of history and a forward-looking perspective, serves as a model for how libraries can adapt and thrive in the face of change. I am profoundly grateful for Cliff's influence, wisdom, and legacy. On a final, personal note, I do not remember ever leaving a conversation with Cliff where he did not ask me to let him know how he could help.

> **Cliff's insights and ability to anticipate the ripple effects of policy changes on the broader scholarly ecosystem have been both a compass and a lifeline . . .**

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Notes

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