# CRL and Educopia Community Convening

Strengthening CRL Global Collections
May 31, 2023

Center for Research Libraries
GLOBAL RESOURCES NETWORK

EDUCOPIA
INSTITUTE

# Greetings & Introductions

**Quick icebreaker/virtual introduction:** Using the Zoom chat box, please let us know: *"Name, city of residence, 1 thing you appreciate about the place where you live OR one word that describes what you are bringing to this community convening?"*

- Katherine Kim, **Educopia Institute Co-Director, CRL Co-Facilitator**
- Jessica Meyerson, **Educopia Institute Co-Director, CRL Co-Facilitator**

# Gratitude

- CRL Staff
- Every person that:
  - filled out the Doodle poll or polls
  - participated in a focus group or an interview
  - sent us documentation
- Every person that contributed to available documentation including committee members, task force members, and global resource program representatives
- Every person that has volunteered to:
  - be on a sprint team
  - review sprint team outputs
  - attend the community convenings
  - otherwise participated directly in this process to strengthen CRL global collections

# Overview of Today's Agenda

- Expectations & Framing
- Overview of the Global Collections Change Process
  - Refresher on objectives, methods, and scope of Phase I Discovery
- Findings from Phase 1 Discovery: *Moving from Collective Action to Collective Impact*
  - Current Roadblocks
  - Actions for Removing Roadblocks
- Action Priorities
- Sprint Teams
- Q&A

# Setting up our virtual space

- We'd love to see you, but welcome you to turn off your camera if that will enable you to participate more fully.
- Turn off your mic in the large group.
- Please feel free to eat, stretch, and move during this convening.
- There will be requests for engagement such as self-introductions and polling via the Zoom chat box
- We will practice **shared accountability** for this virtual space

# Post-Meeting Logistics

- **Recording:** This session will be recorded. The recording and the slidedeck will be available on the new Strengthening Global Collections webpage.
- **Questions:** We will aim to answer as many questions as we can - however, we will be capturing questions to ensure that if they are not addressed in the call, they will be addressed in a future communication.
- **Follow-up Survey:** We'll share a VERY BRIEF follow-up survey where you can document any remaining questions. We will also share links to the recording and slide deck in this message.

# Change Process to Strengthen Global Collections

Building on the work of the CRL Board, CSPC, ICCG, and CRL Staff

Concrete, community-driven recalibration of CRL's global collections activities (*a plurality of overlapping and interdependent functions, activities, and relationships*).

Approaches:

- **surveys, interviews,**
- **full-community convenings**
- **work sprints**

**Clear Scope and Value Proposition for CRL's global collections programs | Impact Model**

**Coherent Vision for Change**

**Implementation Plan with Benchmarks and Milestones**

# Timeline

*We are here*

April | May | June | July | Aug | Sept | Oct | Nov

**Phase 1**: Assess Landscape Changes and Community Needs

**Phase 2:** Articulating Global Collections Impact Model

**Phase 3**: Sustainability Modeling

**Phase 4:** Road Map for Change

**Full-Community Convenings: May, September, November**

# Checking in

I understand the scope and expectations for today's call as well as the high-level scope and timeline for the global collections change process.

**No, I do not understand** **<u>OR</u>** **Yes, I understand**

# Phase 1 Discovery

AMPs, GRNs, External affiliates, Board members, Committee and Working Group members

**Questions addressed the following:**

- Positioning of global collections within CRL mission and priorities | scoping of activities
- Where do collections and equity intersect
- Most important challenges facing collecting institutions | opportunities
- Broader trends accelerating or amplifying challenges | opportunities
- What CRL is best positioned to do in response to challenges | opportunities
- Information or data that could be used to inform collective collecting priorities, and measure impact of collective collecting efforts
- Leadership proficiencies and characteristics for strengthening global collections

# Key Findings from Phase 1 Discovery

| |
|---|
| **Global collections activities at scale are perceived as core to CRL's unique value proposition, however, the scope and resourcing of these activities are not well-understood; activities, relationships, and ways of working have organically evolved over the last two decades.** |
| Broad environmental, economic, political, and technological trends are creating conditions that require stewardship institutions to coordinate their stewardship efforts, particularly global collections efforts |
| **Given our current realities, CRL is perceived as best positioned to leverage its scale to coordinate, track, and help steward collective global collection development efforts among research libraries, in measurable ways, toward an equitable knowledge commons (in ways consistent with the ICCG Call to Action)** |
| Given what CRL is best positioned to do moving forward and with a high degree of consensus regarding the desired impact of CRL global collections activities, CRL must define the scope of support that is can sustainably provide across its global resource programs and work with partners to adjust workflows accordingly (being intentional about finding ways all global collecting activities can benefit from what sets them apart; employing scale as an expertise amplifier). |
| **Given what CRL is best positioned to do moving forward, and with a high degree of consensus regarding the desired impact of CRL global collections activities, collections governance need to be re-evaluated as possibly re-designed to be fit for (future) purpose.** |

# CRL: From Collective Action to Collective Impact

## Collection Action

- Convene around programs and initiatives
- Using data to prove
- Addition to what you do
- Advocate for ideas

## Collective Impact

- Work together to move specific outcomes
- Using data to improve and spread practices across programs and systems
- Is what you do - integrated into the daily professional lives of the people driving the work, not simply extra
- Advocate for what works or what's needed based on data

# Checking in

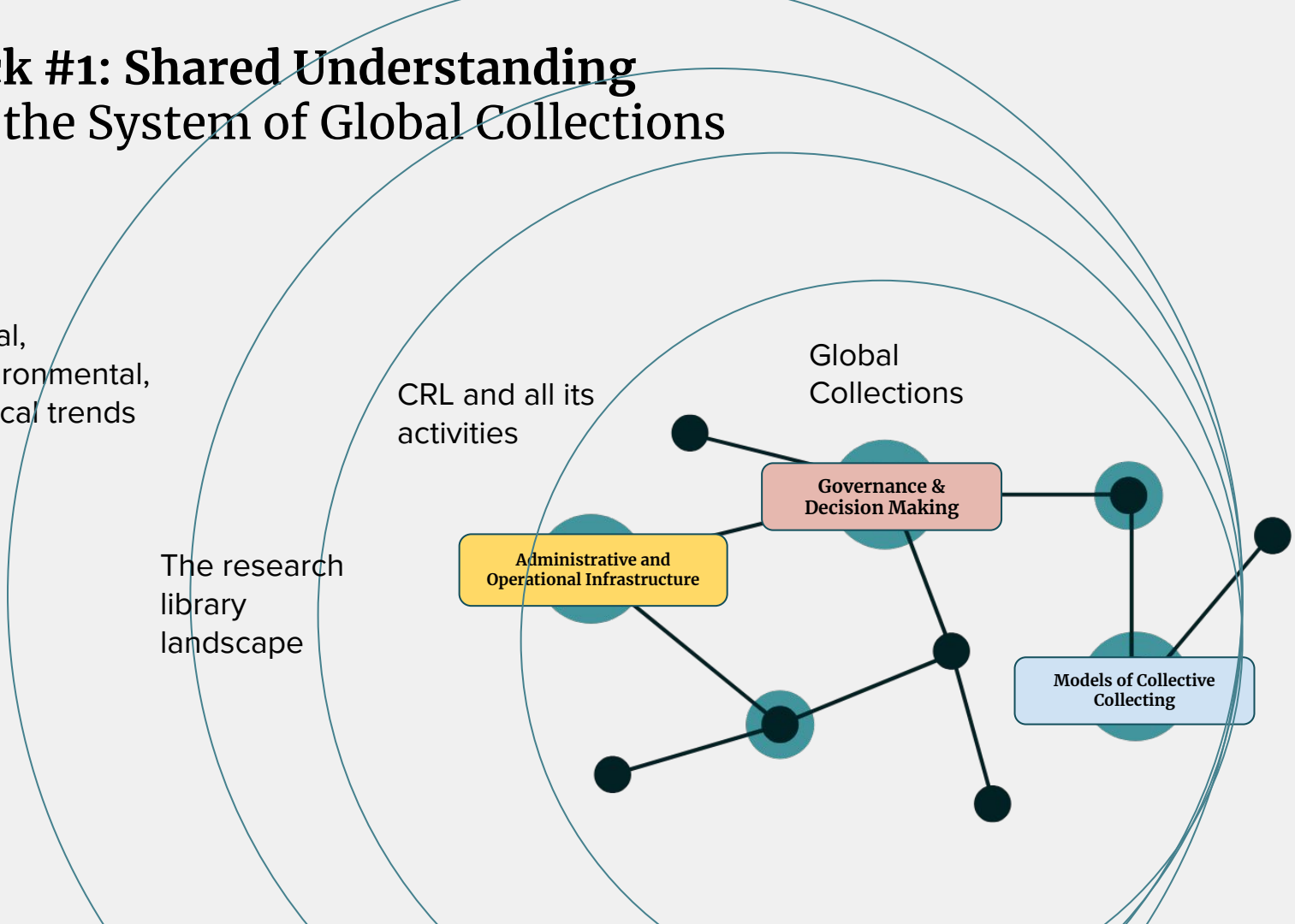
Which 2 aspects of the move from Collective Action to Collective Impact
*are you most excited about?*
(**Type the number, 1-7, in the chat box**)

**1)** Backbone coordinating organization
**2)** Common agenda for change
**3)** Using data to continuously learn, adapt, and improve
**4)** Open and continuous communication
**5)** Mutually reinforcing activities
**6)** Cultivating system level leadership skills
**7)** Thinking expansively about long-term partnerships that crosscut political and geographic boundaries, disciplines, professional domains, and sectors

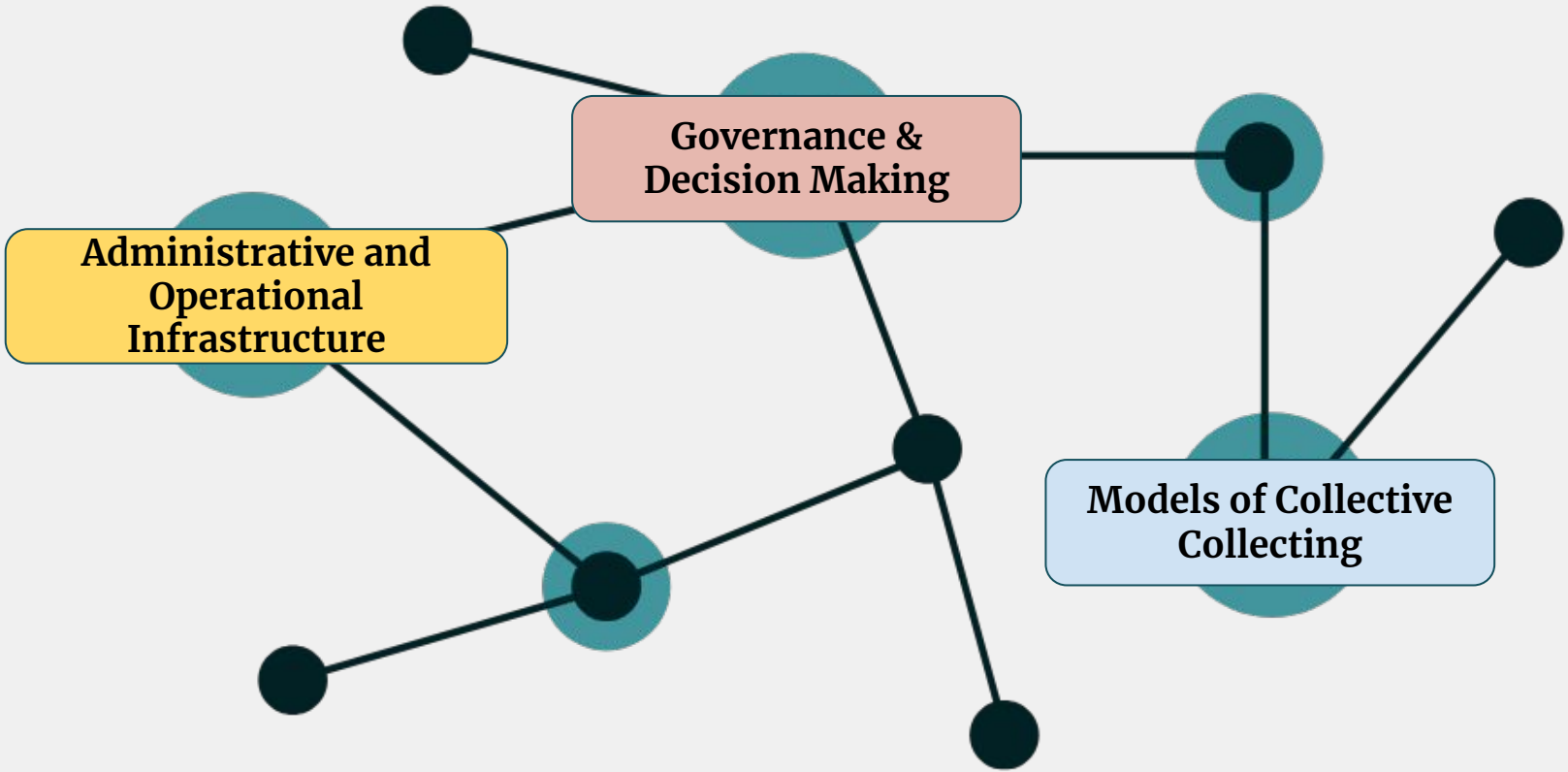
# Roadblocks to Moving from Action to Impact

1. Establishing a shared understanding of the current situation across stakeholders **(Community Convenings and Ongoing Communications)**
   a. Positioning of Global Collections activities within CRL's core functions and strategic priorities
   b. CRL as a backbone organization
   c. CRL global collections as a system
2. Fiscal Sponsorship clarity **(CRL staff working group)**
3. Defining v1.0 of the common agenda - naming explicit strategies for moving from the current situation to the desired impact for CRL's global collections **(Impact Model Sprint)**
4. Governance, Staffing clarity, additional resourcing **(Sustainability Model Sprint)**
5. Longer Roadmap for Implementation **(Roadmapping Sprint)**

# Roadblock #1: Shared Understanding
## Mapping the System of Global Collections



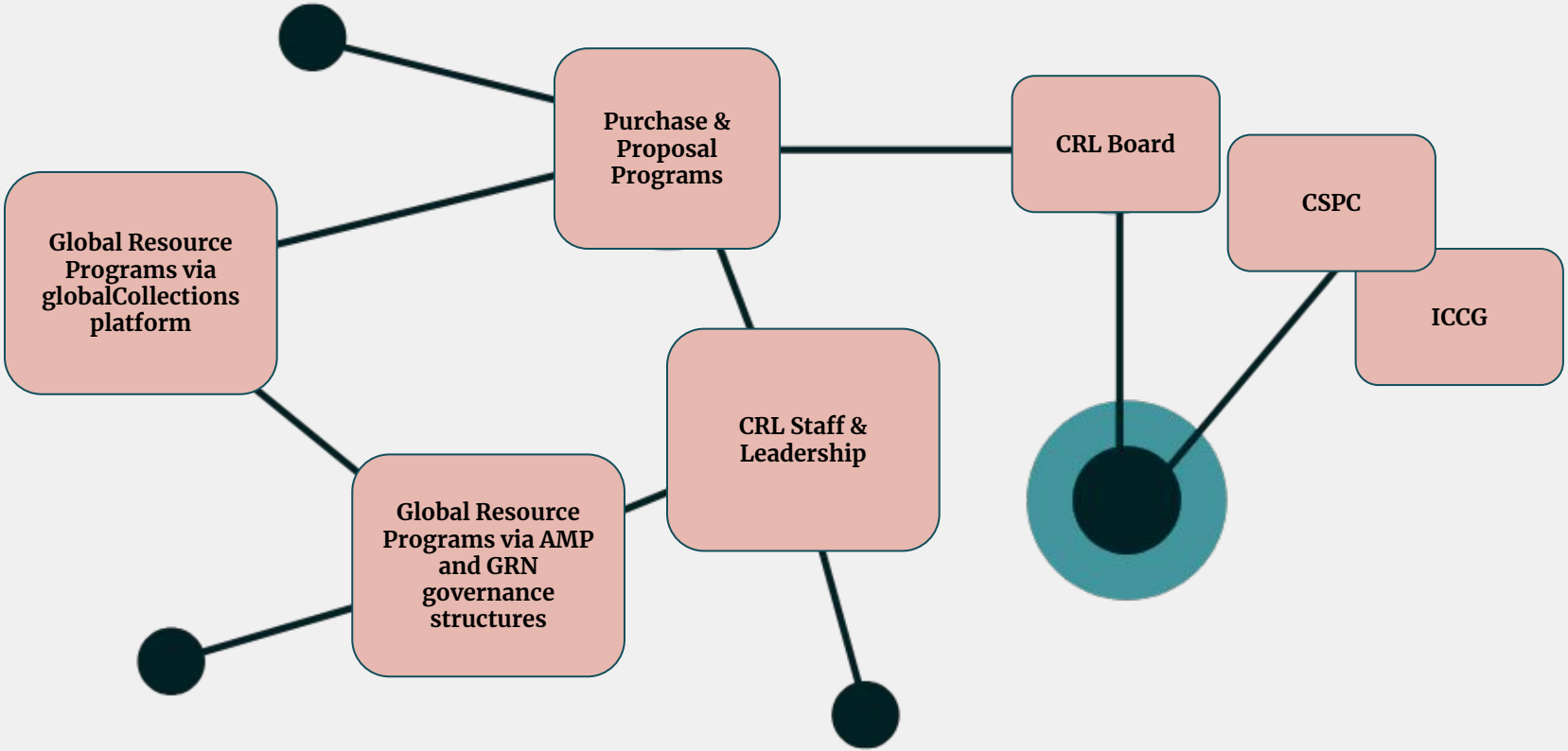
# Roadblock #1: Shared Understanding
## Mapping the System of Global Collections



# Roadblock #1: Shared Understanding

## Mapping the System of Global Collections

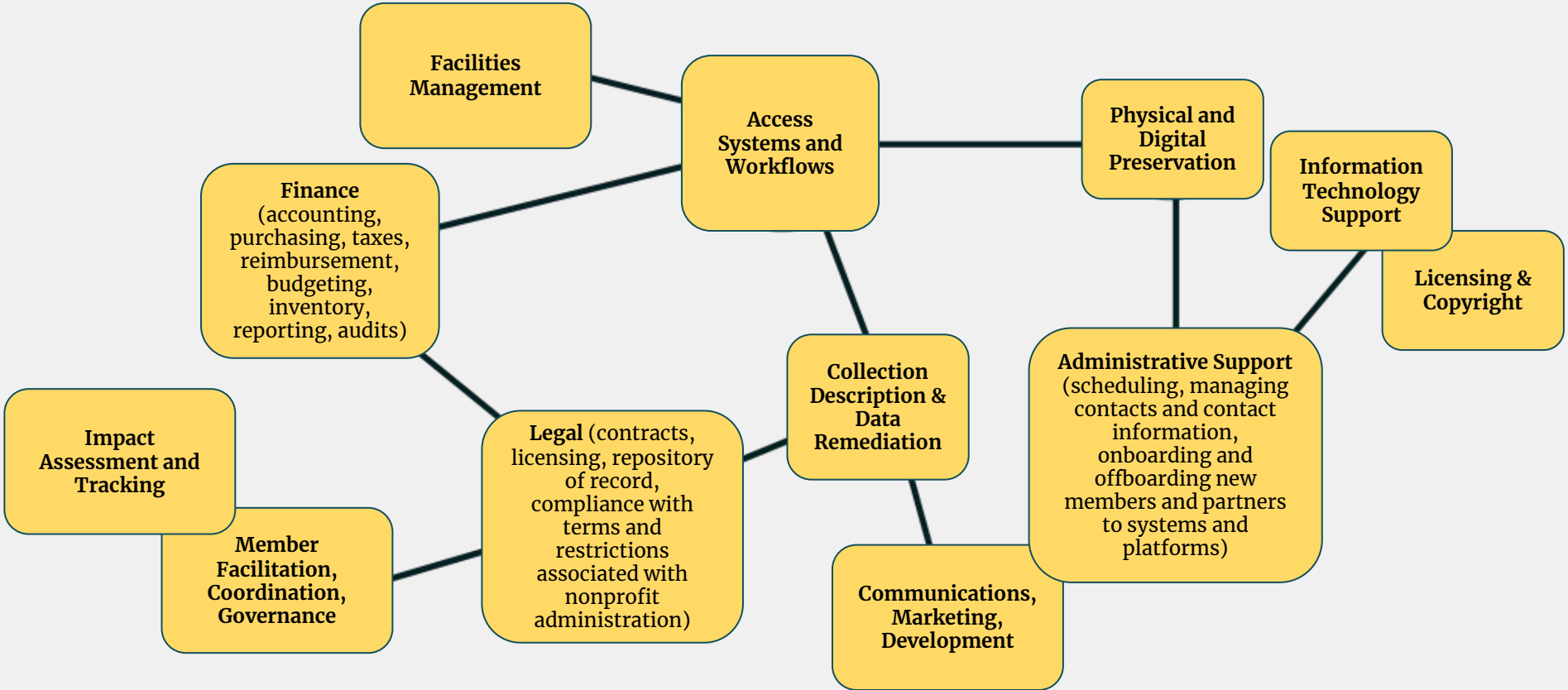
## *"Governance & Decision Making"*



# Roadblock #1: Shared Understanding

## Mapping the System of Global Collections

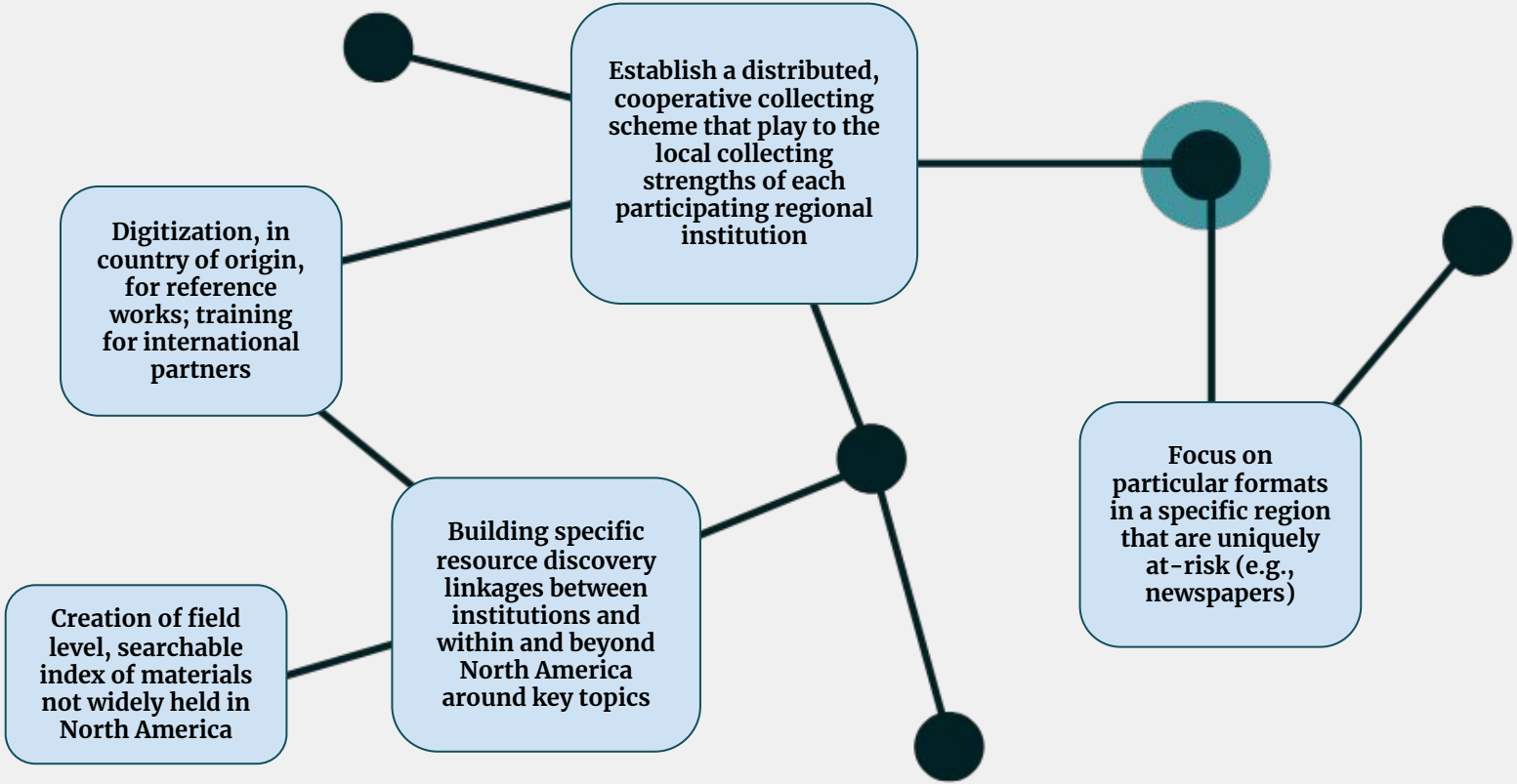
## *"Administrative and Operational Infrastructure"*



# Roadblock #1: Shared Understanding

## Mapping the System of Global Collections

## *"Models of Collective Collecting"*



# Checking in

Where do you place yourself in the system of CRL global collections?
What components of this system are you most heavily engaged/invested in?
(**Type the number or numbers, 1-3, in the chat box**)

1. Decision Making and Governance
2. Administrative and Operational
3. Models of Collective Collecting

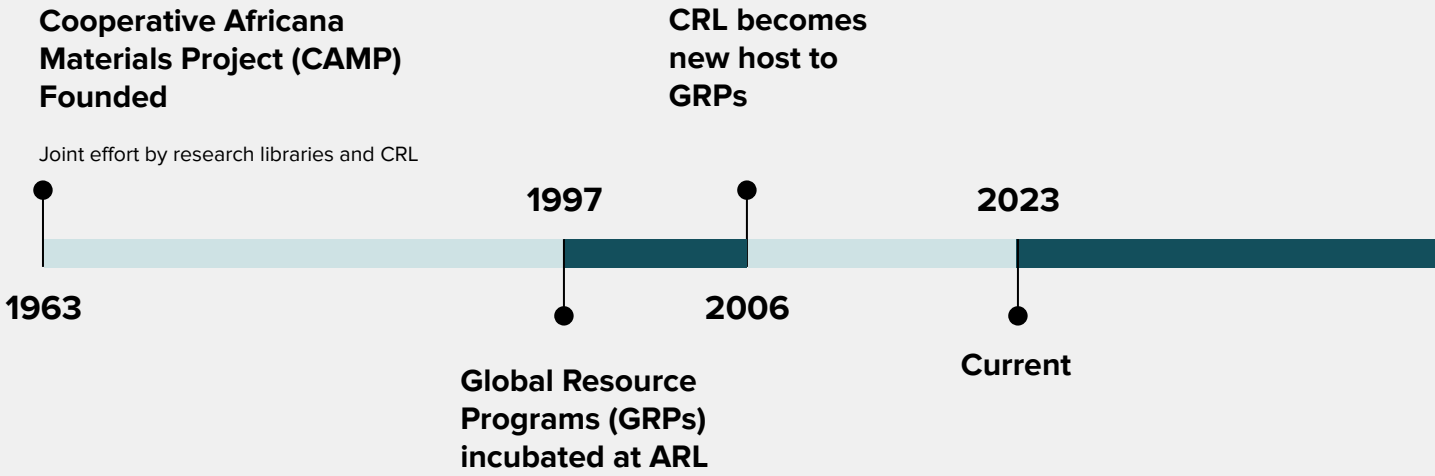
# Roadblock #2: Fiscal Sponsorship Clarity

## What is **fiscal sponsorship**?

There are different types of models, but in very broad terms, fiscal sponsorship is a **relationship** where a **tax-exempt organization**–often called a "fiscal sponsor," "fiscal host," "administrative host," etc.--**provides administrative support and fiduciary and legal oversight** to another organization that **does not have its own nonprofit status**.

"CRL provides an administrative umbrella for programs and promotes cross-fertilization and economies of scale."

Organically and over the course of decades, CRL has become fiscal host to groups of **varying** sizes, activities, infrastructure needs, workflows, membership models, and streams of revenue.



# Addressing Structural Challenges

CRL staff members are currently working to clarify the relationship, expectations, and responsibilities of both the fiscal host and its sponsees.

Staff and AMP/GRN chairs will meet for budget review

The result of this work may also begin to address other roadblocks including infrastructure and stewardship backlogs + staffing clarity.

# Transition to Phase 2: Impact Model
## *Current Situation*

FIELD-LEVEL

- Transition to postcolonial frame for collective global collections activities
- Institutions have competing collecting priorities, and thematic collective collecting can only be accomplished at the field level
- Relationship networks with librarians and knowledge producers in other countries are nurtured over the long-term and require a trusted organization to hold space for those partnerships.
- Lack of staff capacity and resources for area studies, non-English language specializations, diminished investments in skills and competencies, etc. within individual member institutions

ORGANIZATIONAL-LEVEL

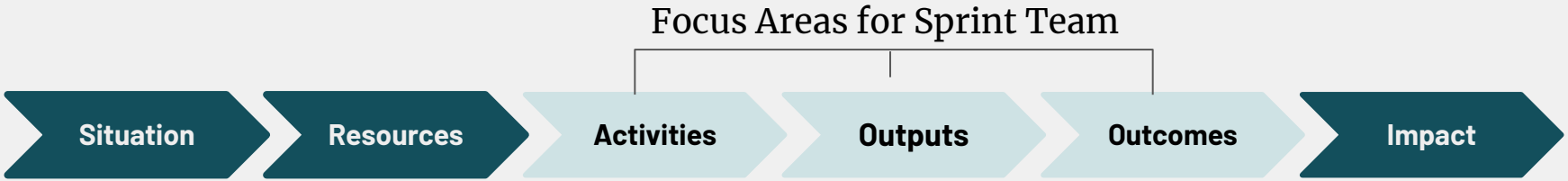
- The number and scale of CRL global collections activities have outgrown current structures, processes, and staff capacity.
- Current misalignment between what we need the CRL global collections governance to enable -- and the structures and processes currently in place to meet them.
- No clear articulation of the types of information inputs needed to feed into and out of the CRL global collections system (which types of information need to be shared with which parts of system when) in order to support governance in making strategic decisions

# Transition to Phase 2: Impact Model
## *Desired Impact*

Led by its members, CRL fosters more equitable partnerships, diversifies & clarifies collection priorities and impacts, defines better collections practices, and addresses the changing field of area studies in a postcolonial environment.

- Advance the cultivation of the post-colonial knowledge commons
- Advance scholarly communication and equity of access in all parts of the world
- Advance discovery and promotion of research resources in regional Institutional Repositories
- Advance collection development of print resources in service of the “collective collection”
- Support timely cataloging and description of print and electronic content, especially for non-Roman script language materials
- Coordinate and support engagement of regional institutions and information producers to develop and sustain collections in a post-custodial setting
- Build/maintain/enable interoperation of digital infrastructure that supports the identification and capture of born-digital resources
- Advance the development of diverse and inclusive, non-Roman script language corpora to support computationally-driven research and teaching

# Transition to Phase 2: Impact Model
## *Roadblock #3: Defining our Strategies*




The focus of the work for the Impact Model Sprint team will be “connecting the dots” - outlining an explicit, logical series of statements that **explain how strategies or activities, and their outcomes will bring about change**.

The Impact Model will serve as a **common language and reference point** as we elaborate on more granular coordinated and sequenced activities by smaller constellations of the CRL stakeholder community in the short, medium, and longer time.

[*The Impact Model Sprint will kick-off in **mid-late June,** 4 sync calls with async work between*]

Names of sprint participants will be shared in a community-wide call as soon as everyone’s availability has been confirmed.

# Phase 2 Impact Model Sprint Deliverables

## Phase 2 Impact Model

- Impact Model Draft
- Community Review of Draft
- Final Impact Model
- August Community Convening

## Fiscal Sponsorship Working Group

- Create broad program structure, resources, and shared expectations for both fiscal sponsor and sponsee
- Staff and AMP/GRN Chairs discuss budget (currently underway) as well as parameters of a fiscal sponsorship program (at this stage, the model will be flexible and refined over the course of this process)

# Checking in

Of the Phase 2 activities described, which are you most excited about?
(**Type the number, 1-4, in the chat box**)

**1)** Seeing an explicit mapping between strategies, their outputs, and the desired impact of CRL global collections activities
**2)** Having a common language and reference point - a common agenda shared by CRL members and stakeholders
**3)** Seeing and understanding the shape of CRL fiscal sponsorship for the global resource programs as part of advancing the desired impact of CRL global collections activities
***4)*** *Something not listed here?*

# Phase 3 and 4 Overview

## Phase 3 Sustainability Modeling

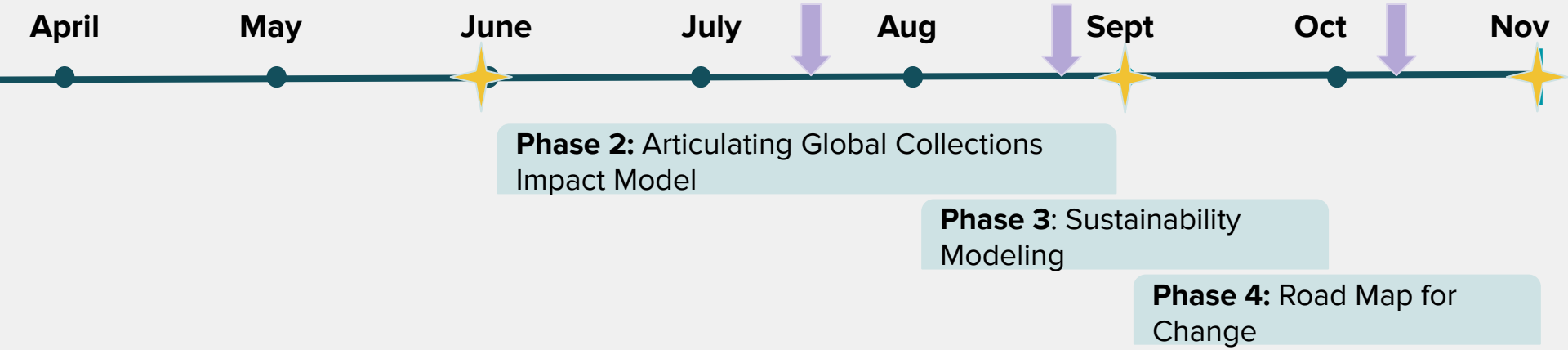
- Finalized value proposition statement for CRL global collections
- 2023+ Global collections governance “fit for purpose”
- Recommendations to the Board for resourcing Impact Model strategies/activities

## Phase 4 Roadmap for Change

Implementation Roadmap, which will include a timeline with benchmarks across all major streams of implementation as well as accountability measures:

- Fiscal Sponsorship
- Governance
- Communications
- Staffing
- Infrastructure
- Shared Measurement

# Community Review Timeline (Projected)




Full-Community Convenings

Community Review

# Thank You & Questions

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