"Spinning In": The Merger of Canadiana.org with the Canadian Research Knowledge Network / Réseau canadien de documentation pour la recherche
"Tourner en commun" : La fusion de Canadiana.org avec le Réseau canadien de documentation pour la recherche/Canadian Research Knowledge Network

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Bengtson, J. & Shepstone, C. (2020). "Spinning In": The Merger of Canadiana.org with the Canadian Research Knowledge Network / Réseau canadien de documentation pour la recherche. *Partnership*, *15*(1), 1–9. https://doi.org/10.21083/partnership.v15i1.6110

Résumé de l'article

Cet article présente le contexte et le processus qui ont mené à la fusion du Réseau canadien de documentation pour la recherche/Canadian Research Knowledge Network et de Canadiana.org. Saisissant une opportunité dans un paysage de recherche numérique en pleine mutation, les deux organisations se sont rapprochées afin de tirer parti de leurs mandats complémentaires et du chevauchement de leurs membres. La nouvelle organisation fusionnée est maintenant mieux placée pour relever les défis du travail collaboratif en matière de recherche ainsi qu'en matière d'accès et d'acquisition de contenu du patrimoine canadien.

"Spinning In": The Merger of Canadiana.org with the Canadian Research Knowledge Network / Réseau canadien de documentation pour la recherche

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Abstract

This article explores the background and process that led to the merger of the Canadian Research Knowledge Network / Réseau canadien de documentation pour la recherche and Canadiana.org in 2018. Seizing a moment of opportunity in a rapidly shifting digital research landscape, the two organizations "spun in" to each other in order to leverage their complementary mandates and overlapping memberships. The new merged organization is now better positioned to meet the challenges of collaborative work in research and Canadian heritage content acquisition and access.

Keywords

Canadian Research Knowledge Network / Réseau canadien de documentation pour la recherche; CRKN/RCDR; Canadiana.org; Canadiana; content; TDR; open access; heritage

Introduction

It is sometimes suggested, in jest or in exasperation, that there are more library associations than libraries or librarians in Canada. As a profession, we know there is great strength in working collaboratively to do more than we could alone. We know that coming together, even through many overlapping member organizations, is valuable because no single organization, or handful of organizations for that matter, could possibly meet all our needs. Our associations exist to bring us together collectively to

solve problems, create new capacity, and explore new ways to work together for our shared benefit. While we are mindful of the diversity of our many library communities and respectful of our specific mandates and unique areas of expertise, we also know that the Canadian library community is relatively small, highly dispersed, and varied in its regional, local, and cohort-aligned missions. In order to remain forward-focused and relevant in our work, we must constantly consider, revise, reimagine, and reinvent our libraries, library consortia, and associations. Whether we are "spinning out" by creating new organizations or "spinning in" to merge and realign existing organizations, the goals remain the same: to create responsive collaborations to meet the emerging needs of our users and provide leadership to our institutions and communities.

The opportunity to "spin in" and merge two complementary organizations presented itself to the Canadian research library community in 2016. The Canadian Research Knowledge Network / Réseau canadien de documentation pour la recherche (CRKN/RCDR) (www.crkn-rcdr.ca/) and Canadiana.org (Canadiana) (www.canadiana.ca/), each created by the research library community as purpose-built organizations with distinct mandates, were becoming increasingly aligned and complementary. With shared outcomes of expanding access to and preserving essential digital research content, these two organizations saw an opportunity to merge. While unique in scope, mandate, type of work, and structure, the two organizations shared overlapping institutional membership and increasingly interrelated mandates. Mergers, however, even highly amicable ones, are more complex processes in many respects than creating new organizations. After a two-year process of "spinning in," often slowly, always thoughtfully, and with much consultation and discussion, CRKN/RCDR and Canadiana formally combined forces in 2018. Canadiana became a programme of CRKN/RCDR so that the new combined organization might better position itself to meet the ongoing and emergent needs of the research library community. This merger enabled new capacity building, infrastructure sustainability, and advancement of emerging research and scholarly communication priorities. It also increased potential for new national and international collaboration opportunities.

About Canadiana.org and the Canadian Research Knowledge Network

Canadiana's history dates back to 1969 with the formation of the Canadian Institute for Historical Microreproductions (CIHM). Canadiana was created in 2008 following the merger of CIHM and AlouetteCanada. The latter was an initiative by the Canadian Association of Research Libraries (CARL) related to the long-term accessibility of cultural content in digital form, created as a response to an era of significant global developments in digital scholarship.

In the late 1990s, CARL and Canada's four regional library consortia (CAUL, BCI, OCUL and COPPUL[1]) approached the Canadian Foundation for Innovation (CFI) for support, demonstrating that systematic access to published research was an essential component of Canada's research infrastructure. The Canadian National Site Licensing Project (CNSLP) was created in 1999 with the participation and support of 64 Canadian universities, and the CFI awarded $20 million to CNSLP to support this proposed approach to research infrastructure development. Participating universities and provincial governments committed an additional $30 million. CNSLP's goal was to bolster the research and innovation capacity of Canada's universities by licensing electronic versions of scholarly publications on a national scale. As more content was licensed, additional staff were hired, and the structure of the project became more formalized. In April 2004, the Canadian Research Knowledge Network was incorporated as a not-for-profit organization.

In the early- to mid-2010s, Canadiana's rapid growth in capability to create and preserve digital heritage content enabled opportunities for collaboration among its stakeholders and funders. However, the pre-existing licensing relationship between Canadiana and CRKN meant that Canadiana was perceived variously as a partner, an arm of LAC, and a vendor or service provider. Canadiana's subscription model was also at odds with university libraries' growing focus on open access. With the end of the Canadiana Héritage project, Canadiana's executive director and board were seeking a long-term model that preserved its digitization and platform capacity and allowed for future growth. Canadiana was motivated by the realization that extending its digital heritage platform to meet the technical sophistication of modern and future scholars needed to go beyond providing images of pages of documentary heritage. Creating metadata to support digitized collection access was one necessary requirement, particularly if the content could be made openly accessible. However, for Canadiana to make its collections openly accessible, a new sustainable funding model was necessary.

In its 2013-2016 Strategic Plan, CRKN/RCDR (2013) emphasized a goal to "collaborate to advance digital scholarship" (p. 4) in addition to objectives around ongoing research content acquisition, member engagement, and a focus on sustainability and expanded collaborations. The proposal by Canadiana to explore a CRKN/RCDR-Canadiana merger aligned well with these goals and objectives and helped advance several existing and emerging national initiatives in which CRKN/RCDR was leading or participating, from CRKN/RCDR's collaboration with CARL's Canadian Sustainable Scholarly Publishing Working Group and a renewed emphasis on open access to discussions of new collaborations and coordination with other initiatives, such as the Leadership Council for Digital Research Infrastructure (LCDRI).

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[1] CAUL: Council of Atlantic University Libraries; BCI: Bureau de Coopération Interuniversitaire; OCUL: Ontario Council of University Libraries; COPPUL: Council of Prairie and Pacific University Libraries

The Opportunity

Canadiana and CRKN/RCDR had a decade-long history of working together to build Canadian content, with 45 CRKN/RCDR-member universities providing the financial investment and governance oversight for Canadiana.org along with the support of Library and Archives Canada (LAC), Bibliothèque et Archives nationales du Québec (BAnQ), Toronto Public Library (TPL), and others. All of these organizations supported Canadian digital heritage activities, specifically digitization and platform development. The signing of the Early Canadiana Online (ECO) agreement between Canadiana and CRKN/RCDR in 2006 was a milestone event for both organizations, directing and investing over $11 million between 2006 and 2017 into Canadiana's operation. This was supplemented by additional investment by CRKN/RCDR members to create the Canadiana Héritage project, which resulted in more than 40 million additional images of Canadian archival materials being added to the collection.

The conclusion of the Canadiana Héritage project in 2014, the certification of Canadiana as a Trusted Digital Repository (TDR), and broader developments in digital scholarship created a prime opportunity for Canadiana to evaluate its value proposition and operations. By the mid-2010s, Canadiana was poised for a strategic repositioning of operations in order to facilitate a fundamental change of its model to provide better access, creation, and preservation of Canadian content.

At the same time, ongoing price increases and budget constraints and the challenges of so-called publisher "big deals" combined with the rise of new forms of scholarly dissemination, particularly open access, were influencing CRKN/RCDR priorities and strategic focus. CRKN/RCDR began looking beyond content acquisition to content rationalization and preservation, open access dissemination initiatives, and other research content and coordination activities.

In June 2016, the boards of directors of both organizations committed to a joint exploration of a possible merger as a potential next step in the organizations' development. The boards felt that a merged organization might be better able to adapt to changing circumstances in the Canadian heritage and scholarly communication environments. The mandates of many organizations in the digital scholarly landscape in Canada at this time were increasingly blurred and overlapping. Exploring ways of collaborating and repositioning organizations to better address a fundamentally digitally-driven research information environment was a driving force in the discussions between Canadiana and CRKN/RCDR. While the two boards were fully aware that there were many challenges to overcome in merging organizations, they agreed that the potential positive outcomes outweighed these concerns (CRKN/Canadiana Task Group, 2017).

The following issues were important considerations to address for a successful merger:

- Legalities and business organization (e.g., not-for-profit versus charity legal structures, organizational culture, physical locations, payroll and benefits issues)

- The exploration of new business models (e.g., open access versus subscription models)

- Perspectives and participation of non-CRKN/RCDR members and non-ECO subscribers (e.g., public libraries, archives)

- The expansion of potential new stakeholders and partners (e.g., other cultural organizations and museums, the support of LAC)

While challenging to work through, the exciting possibility that Canadiana's investments in digitization and systems development might be unlocked, extended, and repurposed through a merger with CRKN/RCDR remained a guiding principle at the center of these discussions. The boards felt that these opportunities could only be realized if each organization was appropriately leveraged and reconfigured to extend existing investments and expertise in new ways. Reimagining the organizations as a single entity was the task of a joint working group comprised of representatives of each of the boards and senior staff from both organizations.

The working group rapidly came to the conclusion that though there were few immediate financial savings to be realized, a merger would enable significant long-term benefits for the organizations' respective member institutions. At the core was an opportunity to make Canadiana content open access and to invest in the TDR as a member-supported national repository for Canadian-created content. In addition to encompassing national heritage content and meeting Tri-Agency[2] open access research compliance requirements, it would also expand institutional repository features and integration, including the potential to harvest Canadian content held across many repositories. Such a national repository, the working group felt, would allow member institutions to pool their collective resources to develop a modern and feature-rich repository.

Indeed, the working group became convinced that a merged organization built around a principled expansion of the TDR would shift the centre of Canadiana's activities to focus more on platform development for the benefit of all Canadians, including Canadian researchers. The effects of a broad investment in the TDR platform would have the same type of transformative effects as envisioned in CRKN/RCDR's (then CNSLP's) original roots as a national site license program initiated nearly 20 years prior. Leveraging national investment in content and infrastructure might be better shared and advanced given CRKN/RCDR's national perspective and voice, broader governance membership and structure (augmented by associate membership options), and international engagement. CRKN/RCDR's licensing cash flow and accumulated

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[2] Tri-Agency is the collective term for the three main Canadian research agencies: Social Sciences and Humanities Research Council (SSHRC), the National Sciences and Engineering Research Council (NSERC) and the Canadian Institute of Health Research (CIHR).

reserves could also be employed in the short term to support and smooth such development in a planned, measured way, while its relationship with the Canadian Foundation for Innovation (CFI) and LAC might position it for further platform funding applications.

CRKN/RCDR's foundational work with the national Tri-Agency granting councils, LCDRI, and the Implementing New Knowledge Environments (INKE) initiative would help to expand Canadiana's effort to digitize, make accessible, and preserve Canadian heritage content. In turn, CRKN/RCDR would benefit from new direct relationships with archivists, museum professionals, and other members of cultural organizations, and more extensive researcher and user communities. Such a merger would also contribute to the ongoing collaborations with CARL and regional consortia (including Scholars Portal) and other organizations and consortia working in the digital scholarly environment. Perhaps most importantly, a combined organization would be far better positioned to advance open access initiatives in Canada, for the benefit of scholars and citizens alike.

Shared Membership

It is important to note that CRKN/RCDR and Canadiana served an overlapping community of members and had complementary goals and considerable shared interests. Separately, each organization had made significant achievements in delivering content and developing robust infrastructure for the research community, the archival community, and ultimately all Canadians. Based on their experience in the academic library community, members of the working group felt that much more might be accomplished when multiple stakeholders with shared interests collaborated to meet objectives. Canadiana's membership brought four important non-CRKN/RCDR members (LAC, BaNQ, TPL, and CARL), as well as a broader community of interest in archivists and public libraries, to the merged organization. In addition, CRKN enabled a larger academic library community (76 academic library members) to actively participate in, support, and help shape the future work of Canadiana.

Open Access

CRKN/RCDR's Canadiana programme now offers some 60 million pages of unique historical Canadian content available at no charge. Making this previously subscription-only content freely available has been a significant step in CRKN's multi-pronged approach to advancing knowledge and open scholarship. It adds considerable value to users seeking access to such resources. Despite this progress, there remain significant challenges to address, including the decolonization of document descriptions, metadata assignments, and the redress of curatorial biases and attention to sensitive content. This important work will require open consultation and respectful relationship-building with expert Indigenous communities. In addition, the cost of making this digital content openly available was identified early on as a key consideration in the discussions of a merger. In order to ensure both appropriate robust access and discoverability and sustainable ongoing access and preservation, the working group knew that a sustainable and equitable funding model would be essential. While the decision to

proceed with the merger was made without a finalized funding model in place, CRKN/RCDR's leadership in the area of consortial approaches to supporting open scholarship, both in the national and international arenas, will no doubt result in positive outcomes.

Expansion of the TDR Platform

Canadiana's certification as a TDR, which covered the technology platform, organization, policies, and procedures, was identified as a significant asset during merger discussions. The substantial investment that Canadiana and CRKN/RCDR members made in the development of the Canadiana platform, including the achievement of TDR status, continues to hold potential for the preservation of and access to Canadian-created content for the needs of scholars, students, and the broader Canadian public. Canadiana's preservation network of TDR servers can provide the backbone for any number of integrated or shared services as an aggregator, a shared repository, and/or linkage of CRKN/RCDR members' and others' repositories. The platform was designed to adapt with software-based API linkages and does not require that other investments and repositories be abandoned, but rather enables the strengthening of this preservation network.

Extending Digitization of Content

By building upon Canadiana's foundational infrastructure and its expertise in digitization, Canadiana as a programme of CRKN/RCDR allows for capacity expansion and improved access to digitization as a service to members. Adding more staff and equipment to an existing service is far more effective and efficient than creating a similar service from scratch in a new organization or within an existing university library. This allows institutions both to build a national digitization service provider and to add to the amount of digital content, especially Canadian content, available and preserved within the TDR. This digitization-as-service model also generates revenue to enhance and sustain Canadiana's digitization capabilities and platform enhancements, and it helps to off-set some of the ongoing costs of ensuring content is openly available.

Cost Synergies

The working group felt that a merged organization would be better positioned to apply for national platform funding through CFI and other granting bodies. Replacing the annual commercial subscription revenue, which proved to be variable and dependent on external budget influences, with a core platform maintenance and operations funding model in the merged organization strengthened the ability to seek additional funding opportunities.

The merger also allowed for the consolidation of some administrative costs in the first year following the merger. This included savings in routine financial functions and processes (bank deposits and accounts payable functions), payroll and benefit administration, communication and HR functions, and other related expenses. The move to openly accessible content has also eliminated the cost associated with

processing and managing subscriptions. With the certified TDR network in place, incremental costs of scaling up are relatively small, especially for storage and the addition of extra nodes.

As the Canadian Héritage project demonstrated, combining limited resources can achieve significant economies of scale in digitization and digital preservation. Offering the services of a TDR in Canada will potentially save members money by diverting and pooling development funds from individual campuses into a national platform. Care will need to be taken to ensure that any work supports existing initiatives and players such as CARL, CUCCIO, Confederation of Open Access Repositories, Scholars Portal, and Research Data Canada. It is important to note that Canadiana does not compete with Scholars Portal, but provides complementary capacity focused on documentary heritage content. Given similar preservation models and the ongoing interest in coordinated Canadian digital research infrastructure, there may be emerging opportunities for future collaboration, such as linking data and supporting common TDR nodes for mutual redundant backup and access load balancing.

Enhanced Staff Capacity and Strategic Value

The synergies of CRKN/RCDR and Canadiana staff and management have proven to be valuable far beyond the modest operational savings. CRKN/RCDR already had a strong outward-facing relationship with the majority of Canadiana's members and subscribers, not to mention other players in the digital scholarship ecosystem in Canada. Canadiana's strength continues to be in delivering digitization services and content delivery. Combined, CRKN/RCDR and Canadiana leverage each other to meet emerging needs of members and take an integrated and strategic approach to digital scholarship and documentary heritage content in an evolving environment. The merger also places a single national organization possessing a diverse set of skills and expertise in a pivotal position to help guide, influence, and position research and scholarship for Canada.

Revenue Growth and Programme Expansion

CRKN/RCDR's channels to Canadian institutions (both members and non-members) and connections to international organizations can benefit the Canadiana programme by creating more opportunities for collaborations and extending the digital-content customer base. As LAC develops its strategy for heritage digitization, the new merged organization has the potential to facilitate new collaborations and resource sharing among LAC and others. Operating within both the digital creation and digital dissemination ends of the scholarly communication spectrum helps to position CRKN/RCDR, and Canadiana as a programme of CRKN/RCDR.

Conclusion

CRKN/RCDR and Canadiana were each created by the academic research library community in Canada. With shared but not fully overlapping membership and complementary mandates, these organizations chose to "spin in" and merge. They

seized a moment in time when opportunities were best leveraged through increased alignment, improved efficiencies, and harmonized expertise. Both organizations were purpose-built at their formation to meet certain content acquisitions objectives. Both organizations have continued to grow and evolve just like the academic institutions they serve, and now that they have merged, they are positioned to adapt and take advantage of an increasingly digital environment.

With a new strategic vision to ensure that "the world's knowledge is accessible by all" by advancing "interconnected, sustainable access to the world's research and to Canada's documentary heritage content" (CRKN/RCDR, 2019, p. 2), CRKN/RCDR has embraced the unique opportunities presented through this merger with Canadiana. Through the almost two-year process of "spinning in," the two organizations have combined expertise and positioned themselves together to best meet the ongoing needs of the research library community. The merged organization is now better able to facilitate new and emerging opportunities to maintain, create, and enable a vibrant research environment. This merger demonstrates that the library, research, and memory institution community is expansive and continues to be one that approaches challenges and opportunities with creativity, flexibility, resiliency, and practicality.

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