

# Final Report for the Online Forum

NEW SHAPE OF SHARING

NETWORKS, EXPERTISE, INFORMATION



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ONLINE SERIES



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AND THE GERMAN-NORTH AMERICAN RESOURCES PARTNERSHIP (GNARP),  
WORKING PROJECTS OF THE CENTER FOR RESEARCH LIBRARIES (CRL)

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Center for Research Libraries  
GLOBAL RESOURCES NETWORK

Sponsored by the Collaborative Initiative for French Language Collections (CIFNAL) and  
the German-North American Resources Partnership (GNARP), working projects of the Center for Research Libraries (CRL)



Piazza Santa Croce, Florence, 2020 © Andrea Ferro - [www.focusontheworld.net](http://www.focusontheworld.net)

## Introduction

Librarians in North America have long-standing relationships with European libraries and materials vendors to support research in the humanities and to maintain non-English collections. In today's research and budgetary environments there are increasing pressures on the traditional humanities, while developments in technology and large-scale initiatives offer new opportunities for collaboration among libraries, publishers, and content suppliers. *The New Shape of Sharing: Networks, Expertise, Information* continued conversations begun at the *New Direction Symposium* held at the German National Library during the Frankfurt Book Fair in October 2017.<sup>1</sup> This multi-day working forum, also sponsored by the Collaborative Initiative for French Language Collections (CIFNAL) and the German-North American Resources Partnership

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<sup>1</sup> New Directions for Libraries, Scholars, and Partnerships: An International Symposium (October 13, 2017), [www.crl.edu/events/frankfurt2017symposium](http://www.crl.edu/events/frankfurt2017symposium), and Brian Vetruba, "New Directions for Libraries, Scholars, and Partnerships: North American librarians' symposium in Europe provide forums to share, collaborate, and learn." *College & Research Libraries News* 80.7 (2019): 382. Doi: <https://doi.org/10.5860/crln.80.7.382>.

(GNARP)—both working projects of the Center for Research Libraries (Chicago, USA)—was originally scheduled to be hosted by Casalini Libri on May 11-14, 2020 in Fiesole, Italy. The in-person event was postponed indefinitely due to the ongoing Covid-19 pandemic.

Not wanting to lose the momentum of more than two years of planning, it was our hope that converting the event into an online series would still offer opportunities to encourage debate and surface new ideas on key issues facing Western European collections and public services during this transformative time. The multiple effects of the pandemic on libraries and academic institutions clearly demonstrated that the topics chosen for the forum—cooperation and sharing of collections, services, and technology among libraries, scholars, and members of the book and publishing communities—are particularly pertinent in today's library environment. The nine sessions in the program focused on three areas: new models for collaborative collection development and services; the growing range of content and format types and their significance for libraries and researchers; and the evolving role of libraries and librarians in the research process.

While the majority of attendees were from the United States, many librarians and information professionals were from Canada, Belgium, France, Germany, Italy, the Netherlands, Spain, and the United Kingdom. The capacity for the in-person forum had been 70, whereas the number of registrants for the online forum reached 300, expanding participation considerably. This report documents as best we could the richness of the sessions and exemplifies new ways of maintaining an open dialog between stakeholders on both sides of the Atlantic. PowerPoint slides, PDFs, and in some cases full videos of the presentations and subsequent Q&A sessions are available through the forum website.

On Monday, January 11, Dr. Klaus Ceynowa, the general director of the Bavarian State Library (BSB) kicked off the online series with a presentation which asked a provocative question "Research Libraries in Digital Times—Last Stand or First Choice? The Perspective of the Bavarian State Library." The programs and activities offered by the BSB—digitization, preservation, mobile applications, and outreach— demonstrate the ways an encyclopedic research library uses technology to enhance and share its collections and services.

## Program Summaries with Highlights and Takeaways



*View from Boboli Gardens, Florence, 2020 © Andrea Ferro - www.focusontheworld.net*

### **Monday, February 1: National and Historical Libraries (Chair, Michael Printy, Yale University)**

- Working with Romance Collections in a National Library: Exploring New Strategies (Valentina Mirabella, Sophie Defrance, British Library)
- The Digital Cicognara Library: An International Open Access Collaboration of the Early Literature of the Arts (Holly Hatheway, Princeton University)

*The presentations in this session explored the ways in which new technologies, practices, and approaches can reshape and revitalize national and historical collections. In the first paper, the respective curators of Italian and French collections at the British Library gave an overview of collection-building in an environment of shared expertise and resources. They discussed new digitization and research projects aimed at integrating digital scholarship into work with students and researchers, presenting an innovative project of creating an umbrella group to enhance and facilitate discussion and collaboration between European languages librarians, academics, GLAM institutions ("galleries, libraries, archives, and museums,"), and interested*

readers, students, and researchers. The second presentation discussed the “Digital Cicognara Library,” an international collaborative project initiated to recreate the renowned private book collection of Count Leopoldo Cicognara (1767–1834), an influential Venetian art historian and bibliophile. The partnership’s effort realizes Cicognara’s Enlightenment-era ideals by making digital copies of his library available online, where they will be fully searchable from a centralized database as well as via relevant subject research portals. Together, the aggregated images and text offer a potentially transformative opportunity for the discipline of art history.

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### Overview

Valentina Mirabella and Sophie Defrance, both curators for the Romance language collections in Europe and the Americas division of the British Library (BL), gave an overview of their work in acquisitions, conservation, description, interpretation and research. Defrance also discussed the French Studies Library Group (FSLG), which operates under the umbrella organization WESLINE, and its role in coordinating the provision of library resources and services in French studies in the United Kingdom.<sup>2</sup> They noted that during the coronavirus pandemic outreach efforts shifted seamlessly online not just for responding to research inquiries but also to promote the BL’s mostly analog holdings, which are second only to the national libraries in France and Italy. Research webinars open to PhD students and a short video series spotlighting *Curators on Camera* to prompt questions across Twitter, Facebook, IGTV and Instagram stories were among these efforts. More time than usual was available for curators and catalogers to write didactic posts about unique holdings in the library’s European studies blog. Despite successful partnerships with Google and the Bibliothèque nationale de France (BnF), the pandemic-related lockdown exposed lacunae in locally digitized content as well as a lack of online subscriptions. Acquisitions have been slow and budgets smaller in recent years, forcing a closer look at new strategies and ways of cooperating.

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<sup>2</sup> French Studies Library Group (FSLG), <https://frenchstudieslibrarygroup.wordpress.com>.



Holly Hatheway, head of Princeton's Marquand Library of Art and Archaeology, gave an overview of The Digital Cicognara Library.<sup>3</sup> Begun in 2015, this international initiative to recreate in digital form the private book collection of Count Leopoldo Cicognara (1767–1834) exemplifies best practices in interlibrary cooperation to make openly available important scholarly resources held in institutions on both sides of the Atlantic. Contributing and founding partners include The Vatican Library, The Frick Art Reference Library, The Getty Research Institute, Harvard University Library, Universitätsbibliothek Heidelberg (Heidelberg University Library), National Gallery of Art, Washington, DC, and Princeton University Library, with support from the Kress Foundation. To maximize the sharing of images previously separated in silos, the International Image Interoperability Framework (IIIF) was chosen for platform-neutral viewing of digital reproductions, and the Getty Research Portal was selected as the means by which libraries contribute links and corresponding metadata for their digitized copies. Together, the aggregated images and text in the corpus offer a potentially transformative opportunity for both art history and digital humanities research through newly created metadata while also having broad interdisciplinary appeal.

### *Discussion and Next Steps*

While the topics in this panel were not directly addressed in the next-steps group discussions, some themes arose which might relate in terms of expanding the capacity of cooperative collection development. On the digital humanities front, there is always more work to be done in terms of making text, metadata, and surrogate images available to researchers. As the BL and BnF have been exemplary in these efforts, it would behoove other national libraries on the European continent to follow suit. Pan-European data repositories DARIAH-EU and Zenodo, which allow researchers from all disciplines to share and preserve their research outputs, regardless of size or format, were mentioned.<sup>4</sup> Other valuable takeaways are the examples of digital outreach that the BL is doing for audiences of all levels, from general library users to postdoctoral

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<sup>3</sup> The Digital Cicognara Library, <https://cicognara.org>.

<sup>4</sup> DARIAH-EU, [www.dariah.eu](http://www.dariah.eu) and Zenodo, <https://zenodo.org>.

researchers. The open digital corpus of The Digital Cicognara Library establishes an inspiring model whereby 21st-century technologies are advancing Enlightenment-era ideals.

**Monday, February 15: Bibliodiversity in Southern Europe: A Panel on Independent and Small Press Publishing (Chair, Claude Potts, University of California, Berkeley)**

- Pepé Olona, Arrebato Libros
- Bibliodiversity in France in a Time of Crisis (Anne de La Rochefoucauld, Amalivre)
- Independence, Coherence, Bibliodiversity (Marco Zapparoli, Marcos y Marcos & ADEI – Associazione degli editori indipendenti)

*Three experts in the publishing sector from France, Italy, and Spain presented on the current state of independent and small press publishing in each of the countries or linguistic regions they inhabit. They shed light on the vital role of bibliodiversity in an information ecosphere increasingly threatened by overproduction and dominated by publishing conglomerates. Specifically, they addressed how publishers, bookdealers, vendors, and librarians continue to collaborate in promoting the values of diversity, innovation, and social justice despite adversities such as the Covid-19 pandemic.*

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*Overview*

Pepé Olona, founder of Arrebato Libros in Madrid, kicked off the panel by presenting on his public role in promoting poets through festivals such as POETAS (and most recently an international collaborative project, Universalpoem.com) as well as through social media, digital printing, and his bookstore and publishing house.<sup>5</sup> Over the past fifteen years, he has witnessed a significant rise in new publishers in Spain, who, thanks to the Internet, are experimenting with novel formats and models of production and dissemination. It is no longer necessary to get signed by the major

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<sup>5</sup> Arrebato Libros, [www.arreatolibros.com](http://www.arreatolibros.com); POETAS 2021 <http://2021.poeticofestival.es>; and Universal Poem, <https://universalpoem.com>.

publishing houses for poetry such as Hiperion, Pre-Textos, or Visor to get published. He also exhibited several innovative works such as zines, artists' books, or self-editions from "outsider" publishers who have established not only their own formats and rules but also their own distribution channels. They are unlike independent publishers who work with conventional enterprises and are equally susceptible to the dominance of publishing conglomerates and to the effects of market overproduction.

Anne de La Rochefoucauld, director of the book vendor Amalivre, addressed the paralysis in the distribution of print books during the Covid-19 pandemic and related lockdowns across France in 2020. Deemed "non-essential" by the French government, bookstores were shuttered for months on two separate occasions but after public outcry received some government assistance. Many readers crossed over to e-books, so the digital format reached historical peaks, while others protested monopolization by companies such as Amazon at all levels of the book life cycle. She explained how bookstores and libraries in France consider themselves on the frontlines for critical cultural discussions on topics relating to race, gender, and politics, defending spaces that must be protected for alternative points of view to be heard. Some organizations that support and promote bibliodiversity are the Centre national du livre, le Syndicat national de l'édition, Alliance internationale des éditeurs indépendants, and Bureau international de l'édition française.<sup>6</sup>

In 1981, Marco Zapparoli founded the independent publishing house Marcos y Marcos with Marco Franza, and he is currently the president of ADEI—Associazione degli editori indipendenti (Association of Italian Independent Publishers), which represents 260 publishers.<sup>7</sup> His presentation affirmed the indispensability of independent publishers in the Italian publishing ecosphere, constituting approximately 40 percent of the market and showing no signs of decline. Despite predictable setbacks from the coronavirus pandemic, the space and weight of independent publishers in Italy have steadily grown in the past decade. He attributed this both to a harmonization with independent bookstores and to the ability of independent publishers to market themselves creatively. Among his concerns, he cited "weak" readership in general in

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<sup>6</sup> Centre national du livre, <https://centrenationaldulivre.fr>; Le Syndicat national de l'édition; <https://www.sne.fr>; Alliance internationale des éditeurs indépendants; <https://www.alliance-editeurs.org>, and Bureau international de l'édition française, <https://www.bief.org>.

<sup>7</sup> Marcos y Marcos, <https://marcosymarcos.com>; Associazione degli editori indipendenti (ADEI) and <http://www.associazioneadei.it>.



Italy, which is countered by very “strong” readers who financially sustain both the bookstores and the publishers. E-books remain inconsequential for most readers in Italy. Aside from ADEI, organizations such as Tribùk—Incontri tra editori e librai and book fairs such as the Salone internazionale del libro in Turin, Più libri più liberi in Rome, and Book Pride continue to showcase independent publishers and promote bibliodiversity.<sup>8</sup>

### *Discussion and Next Steps*

An enthusiastic discussion ensued on this topic. Questions arose about the definition of bibliodiversity. Is it limited to just books, or should other formats be included? As Olona’s “outsider” works exemplify, there are many publishing formats across Europe that meet the criterion of format diversity. Across the continent, there is a rich history of diverse human experience, and it is not by any means a homogenous culture; Europe is linguistically diverse by its nature. Still, a question was posed as to whether linguistic diversity should actually be included in DEI initiatives. The monopolization of funding for English-language materials in academic library budgets remains a concern. Furthermore, issues of respectful and culturally sensitive metadata should not be excluded from the challenge, as subject headings, classification, and the language used in bibliographic and archival description are being critically revisited. More education and communication may be needed in European studies to show that it is truly a rich and diverse field of study.

Bibliodiversity does not happen without intention, together with a recognition that vendors as well as students, faculty, and other librarians are our key partners. It may be required of us to rethink how we define our collections, which are usually defined by language or geographic limits. While approval plans can be revised, much material that fits within the parameters of bibliodiversity is not easy to identify, has limited distribution, and is definitely not commercial. Acquisition trips and attending book fairs are often the sole means of discovering such material. Through information-sharing on CRL listservs and in the European Studies Section newsletter, some of these

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<sup>8</sup> Tribùk—Incontri tra editori e librai, <http://tribuk.it>; Salone internazionale del libro, <https://www.salonelibro.it>; Più libri più liberi, <https://plpl.it>; and Book Pride 2020, <http://bookpride.net>.

challenges can be addressed together.<sup>9</sup> Could vendors assist in periodically identifying new independent small presses or notable publications? Cooperation is central to moving forward but requires further discussion.

**Monday, February 22: Digital Archives, Digital Humanists, and Librarians (Chair, Sarah Sussman, Stanford University)**

- A Discussion with Carlotta Paltrinieri (Historic Environment Scotland; Towards a National Collection UK, Bibliotheca Hertziana) and Déborah Blocker (UC Berkeley)

*This session provided an overview of the ways scholars, librarians, and archivists adapt their work to incorporate digital resources and tools, with a focus on digital resources and recent trends in digitization and tools for libraries, archives, and researchers. The main themes during this inside look into the Medici Interactive Archive and the Italian archive were collaboration, dynamism, and interactivity.*

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*Overview*

Carlotta Paltrinieri, formerly of the Medici Archive Project and now part of the team “Towards a National Collection UK,” was the main speaker in this session. She spoke on scholarly research practices that are made possible by the digitization of content, on the one hand, and the evolution of digital tools for analysis and collaboration, on the other.<sup>10</sup> UC Berkeley professor of French and Italian Déborah Blocker responded to Paltrinieri’s talk. Attendees gained knowledge about various projects in European digital humanities and were encouraged to think about their own knowledge and involvement in this field through quick participant polls throughout the presentation. Paltrinieri opened the presentation with an overview of the various projects in which she has been involved, such as “Towards a national collection UK,” an initiative which aims to remove barriers between the country’s different cultural

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<sup>9</sup> ESS Newsletter, Association of College & Research Libraries, European Studies Section, <https://ess.lib.byu.edu/newsletters/ess-newsletter>.

<sup>10</sup> The Medici Archive Project, [www.medic.org](http://www.medic.org) and Towards a National Collection, [www.nationalcollection.org.uk](http://www.nationalcollection.org.uk).

heritage collections with the aim of finding new commonalities and research possibilities, and an exploration of post-digital library collection development at the Bibliotheca Hertziana.<sup>11</sup>

Following this introduction, Paltrinieri divided the rest of her talk into three sections that offered practical advice and examples. First, she spoke of ways that researchers have been adapting their research in a remote setting, when access to physical resources is not possible, examining ways that scholars have worked and analyzed digital materials. Next she looked at recent trends in digital humanities and tools for incorporating them into research. Here, Paltrinieri focused on tools for spatial, visual, and network analysis methods, such as software for mapping and GIS, automated text recognition, network analysis, annotations, and the creation of virtual exhibits. She concluded with sections on working in Italian archives, working with digital archiving platforms, and identifying and applying for funding for library digital humanities projects.

Paltrinieri's presentation was a dense overview of many of the challenges and opportunities that digitization and digital humanities tools offer for libraries and archives and their users. Blocker responded with some thoughtful observations from her own research, bringing up additional issues such as training, the importance of subject knowledge and context, and the recognition that digital tools are not neutral but may intersect or be at odds with established humanities methodologies. The session concluded in a discussion between both panelists, with additional questions about sustainability and prioritization of resources.

### **Monday, March 1: Consortial Collection Development 1 (Chair, Sebastian Hierl, American Academy of Rome)**

- From Discovery to Delivery: The New Shape of Sharing in a Networked Environment (Denise Hibay, New York Public Library)
- A Multitude of Voices: Ensuring the Vitality of Global Collections through Collaborative Action (Elizabeth E. Kirk, Harvard University)

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<sup>11</sup> Biblioteca Hertziana, [www.biblhertz.it](http://www.biblhertz.it).

*The first presentation provided an up-to-date overview of The Research Collections and Preservation Consortium's (ReCAP) project to transform the partnership from joint operation of a shared facility to cooperative stewardship of one of the largest managed shared collections in the United States. The Discovery to Delivery Project, with critical and longstanding support from the Andrew W. Mellon Foundation, has enabled the partners to both plan and implement a shared print collection, including the design and development of a cloud-based middleware solution, which allows patrons from the New York Public Library, Columbia University, and Princeton University to seamlessly discover, request, and borrow shared material regardless of the owning institution. The integration of Harvard University, which joined the consortium in January 2019, is currently underway and will further transform the partnership, expanding the shared collection and advancing strategies for collaboration in building and preserving physical collections. With this new service model as its foundation, the second presentation reviewed the partners' deep engagement in developing new models of collaborative collection development for European and other world language materials.*

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## *Overview*

Consortial collection development emerged as one of the key themes of the New Shape of Sharing forum, and two sessions were devoted to presentations about this topic. This first session focused on the groundbreaking project ReCAP, with presentations by Denise Hibay of The New York Public Library and Elizabeth Kirk of Harvard Libraries. ReCAP, which stands for Research Collections and Preservation Consortium, originated in 2000 to bring together the collections of the New York Public Library, Princeton, and Columbia in a jointly operated shared storage facility.<sup>12</sup> Harvard joined ReCAP in 2019. The high-density storage facility contains 16.5 million items as of early 2021. The project started as the joint operation of a shared facility and since 2017 has evolved into the cooperative stewardship of a shared collection. ReCAP offers its community members “Discovery to Delivery”: expanded access to materials, common delivery services such as ILL and scanning, and the preservation of the collections. Materials have one of three designations: shared (available to all and subject

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<sup>12</sup> The Research Collections and Preservation Consortium (ReCAP), <https://recap.princeton.edu>.

to retention commitments); open (available to all, not subject to retention commitments); and private (available only or primarily to users affiliated with the owning library).

With the launch of the shared collection in 2017 and the addition of Harvard's collections in 2019, each library gained access to between eight and nine million additional items. Requests for physical and electronic document delivery increased. Hibay's overview of ReCAP focused on the goals and logistics of the shared collection, particularly the design and implementation of the middleware product. The middleware, which is open source and available on GitHub, makes the shared collection possible. It was designed to be the nexus between the different ILS, to bring together catalog records and metadata of the libraries, allow for collection analysis, and serve as the backbone for services spanning from the selection and acquisition of resources (supporting the management of duplication at the point of purchase) to providing physical and digital access.

Kirk followed with a presentation highlighting how collaboration, as exemplified by ReCAP, is necessary to ensure the vitality of global library collections. She spoke on ReCAP's goals and the challenges it aims to address. The four libraries in the consortium have a commitment to develop and curate global collections for the positive impact of research collections on research communities, managing the constraints of space and funding, and the benefits of distributing the responsibility for retention of materials that are not widely held. Despite the libraries' common obligations, Kirk noted the importance of maintaining flexibility and recognizing ambiguity: each library has local obligations, and urgent issues do arise. Overall, collective collection development and shared preservation strategies offer opportunities for a more diverse and global library collection.

### *Discussion and Next Steps*

The discussion following reflected the rich content of the presentations and the complexities—technical, logistical, and conceptual—of the ReCAP project. Some of the issues raised included the following:

- The need for even more analysis to understand the benefits of collaborative collection development for diversifying international collections (small press, languages, difficult to acquire materials, etc.);
- The maintenance of middleware in a collaborative and open source environment—the ReCAP product is available on GitHub;
- The impact of collaborative collection development on the vendors; while collaborative collection development offers the opportunity to work closely with vendors, it also may impact sales, especially since the institutions involved may be among the few buying certain niche items;
- The expanded digital access to materials during the Covid-19 pandemic, from both increased purchasing of e-books and HathiTrust ETAS, offers another challenge to shared collection-building.<sup>13</sup>

Overall, the response to this panel showed a desire to learn more from ReCAP as it goes forward.

### **Monday, March 15: Consortial Collection Development 2 (Chair, Katie Gibson, Miami University of Ohio)**

- International Print Collections in a Consortial Environment: A Case study of Western European Resource Sharing (Manuel Ostos, Penn State University & Lisa Gardinier, University of Iowa)
- Sustainable Vendor-Inclusive Cooperative Collection Development (Barbara Alvarez, University of Michigan & Patricia O'Loughlin, Casalini Libri)

*This panel discussion discussed issues of cooperative collection development from both the vendor perspective and that of librarians.*

*Barbara Alvarez and Patricia O'Loughlin discussed issues librarians and vendors face as they work together to support collaborative collection development, as libraries work to decrease duplication within their "collective collection" and seek to increase the breadth of the collective*

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<sup>13</sup> HathiTrust Emergency Temporary Access Service (ETAS), [www.hathitrust.org/ETAS-Description](http://www.hathitrust.org/ETAS-Description).



*holdings, both print and electronic. In this prospective environment, vendors of library materials that provide selection services via approval plans will be in a unique position to help achieve collective library goals. Library partners and vendors will need to implement strategies that assure a sustainable business model for all involved. Currently, a few pilot projects are underway to test the feasibility of vendor-supported cooperative collection development for specific geographic areas. Initial results of those pilots were shared with participants.*

*Manuel Ostos and Lisa Gardinier described their model for collaborative collecting print resources to support research and teaching across the Big Ten Academic Alliance (BTAA) institutions, while ethically supporting the fragile distribution networks that supply international materials to academic libraries. Drawing from a pilot project for Latin America implemented among several BTAA institutions, the authors discussed the results of this model and how European studies would benefit from a shared collection.*

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## *Overview*

The point of departure for both panel presentations was the 2019 statement of the Big Ten Academic Alliance (BTAA)—“The BIG Collection. Commitment to an Interdependent Future”—which marked a transition of the consortium away from building local collections toward creating a single, collective collection.<sup>14</sup> Both presentations highlighted the interdependent nature of building and sharing collective collections, and indicated that the interdependency extends to an entire ecosystem of library vendors and distribution networks that partner with libraries. Not only do they contribute to the selection and supply of materials, they also support their bibliographic control and physical processing. This ecosystem suffered considerably because of the coronavirus pandemic and ensuing budgetary cuts. The presenters posed questions about how we can maintain a sustainable balance in the ecosystem while moving towards a collaborative model of collecting that results in broader and more unique acquisitions.

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<sup>14</sup> Sustaining Values and Scholarship: A Statement by the Provosts of the Big Ten Academic Alliance, <https://www.btaa.org/about/news-and-publications/news/2019/06/10/sustaining-values-and-scholarship-a-statement-by-the-provosts-of-the-big-ten-academic-alliance>.

Lisa Gardinier and Manuel Ostos, both area studies librarians, presented their research on sharing of Spanish-language print materials within the BTAA since the implementation of UBorrow, as well as on the subsequent analysis of the Latin American holdings across the consortium.<sup>15</sup> Gardinier adapted this methodology to analyze the BTAA Eastern European collections. Together they presented on two pilot projects for reducing duplication of approval plan acquisitions from Mexico and Brazil undertaken by two groups of BTAA institutions in collaboration with library vendors. They commented on the desirability of different levels of duplication across different subjects or countries. Patricia O'Loughlin, of Casalini Libri, presented the vendors' perspective on collaborative collection development and the challenges of the pandemic. O'Loughlin and Barbara Alvarez, who directs international studies and is the romance languages librarian at the University of Michigan Library, stressed the need to include library vendors in planning for the collective collections, as the success of this undertaking strongly depends on the stability and sustainability of the entire ecosystem. Sustainable collecting and sharing of resources for libraries are interdependent with sustainable business models for vendors.

### *Discussion and Next Steps*

The discussion following the panel revolved around communicating with the library administration about both print acquisitions for international collections, the importance of and maintaining stable collection budgets that support the international distribution networks, which are especially fragile in the post-pandemic.

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<sup>15</sup> UBorrow - Big Ten Academic Alliance, [www.btaa.org/library/reciprocal-borrowing/uborrow](http://www.btaa.org/library/reciprocal-borrowing/uborrow).

**Monday, March 22: Assessment and Collection Development (Chair, Kathleen Smith, Stanford University Libraries)**

- Assessment for Resource Sharing: The Use of Bibliometrics for Collection Development in Italian Academic Libraries (Rossana Morriello, L'Università degli Studi di Roma "La Sapienza" and Politecnico di Torino)
- Collection development and Acquisitions Strategies for Libraries and Publishers (John Lenahan, Ithaka S+R/JSTOR)
- Library Support for an OA Journal (Timothy Shipe, University of Iowa)

*This panel discussion on collection development and assessment focused on the academic landscape in terms of open access (OA) publishing models and research evaluation activities.*

*Rossana Morriello described how the use of bibliometrics for research evaluation is causing many consequences for researcher behavior. The massive use of bibliometrics is changing the publishing scenario and increasing trends to concentrate scientific publications in the journals of a few big publishing companies, some of which are also the producers of the citation databases used for evaluation. This presentation analyzed data collected from a survey of Italian academic libraries about the use of bibliometric tools for collection development, and investigated whether libraries have been contributing to these trends.*

*John Lenahan reviewed the development of sustainable OA models and discussed how usage data can help libraries and publishers understand research trends to support future publishing opportunities and the prudent acquisition of licensed content. JSTOR is working with the library and publisher communities to develop long term sustainable OA publishing models, while at the same time supporting a platform and service to provide licensed content from publishers that is paid for by the library.*

*Timothy Shipe explored how a number of academic libraries are helping to further the cause of OA publishing through subvention of authors' fees or through in-house infrastructure and technical support for locally mounted journals. His talk examined how one university library is supporting OA by providing not only technical and infrastructure support, but also editorial support in the form of professional and student staff time in order to publish a free, peer-reviewed*

*academic journal. This discussion focused on how support for this journal fits in with the library's overall strategies for encouraging alternative publishing models—and on the arguments used to convince the library, the former editor, and the scholarly society to pursue this unusual approach.*

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## Overview

This panel on collection development and assessment centered around the impact of Open Access (OA) resources on the library landscape from the local level to worldwide scope, and around the difficulty of comparing usage and access data. Rossana Morriello, librarian for research assessment at Politecnico di Torino (Polytechnic University of Turin, Italy), began the panel with her detailed discussion of bibliometrics as collected and used by Italian academic libraries. There are important lessons for all academic libraries and research institutions to be learned about the understudied impact of OA resources, particularly as they relate to questions of unequal access worldwide and payment methods for supporting publishing. Libraries do not currently collect and analyze data about OA usage, particularly since data about access to paid resources is so easily available; the statistics driving funding allocation are based on data from libraries tracking use of their catalogs and from publishers, but it is essential to track OA usage and to compare it to usage for paid resources to guide collection decisions and to communicate with governmental funders.

John Lenahan, the associate vice president of all published content on JSTOR, presented a close-up look at access and usage statistics from the perspective of JSTOR. This last year of pandemic upheaval and remote access has brought about renewed emphasis on understanding how researchers and other users, particularly those not affiliated with libraries and educational institutions, discover and access the online materials they need. There is much that goes into trying to understand access and usage. When publishers and institutions look at this data together, comparing their statistics, then they can better work together to develop sustainable models.

Timothy Shipe, curator of the International Dada Archive and liaison for Arts and Literature at the University of Iowa Libraries, described his extensive experience with one OA journal, *DADA/Surrealism*, and the conditions which led to the journal coming under the library's wing. The University of Iowa Libraries provide editing and management support, as well as technical and infrastructural support, for this journal in order to ensure its sustainability and longevity. This uncommon OA model has distinct advantages for the journal in terms of stability but has also led to some significant challenges and open questions. In response to an audience question about usage statistics, Shipe noted that usage statistics for this journal are available, but there is no way to compare that information with that of other journals from the same press, let alone other platforms.

### *Discussion and Next Steps*

The largest issues that emerged from this panel are the need for collecting data about usage and access of all types of research resources, including OA publications, and the importance of understanding and exploring the needs of users beyond large academic libraries and institutions in North America and Western Europe. Usage statistics form the basis for decisions about funding allocations that are made at higher levels and, in many cases, by national governments. If the data that underpins these decisions leaves out important publications, primary sources, and unpublished materials, the omissions will lead to increasing difficulties in ensuring the longevity of resources important to users around the world.

### **Monday, April 12: Poster Session (Chair, André Wenzel, University of Chicago)**

*With a common theme of collaboration, the posters covered a variety of topics, including special and area studies collections, digital humanities, and mentoring. The session included questions and discussion.*

- Expertise Sharing through Virtual Mentoring  
Kelsey Corlett Rivera (Library of Congress, National Library Services for the Blind) and Pirjo Kangas (Finland)

*This poster explored how best practices developed for a virtual mentoring program could be applied to facilitate expertise sharing, relationship building, and collaboration among European Studies librarians and vendors in the US and abroad. Virtual options have become even more necessary due to travel and budget restrictions brought about by the Covid-19 pandemic.*

- **A Cross-Atlantic Collaboration**  
Hélène Huet (University of Florida)

*This poster featured a one-semester collaboration in Fall 2018 between a student from the École nationale supérieure des sciences de l'information et des bibliothèques (ENSSIB) and librarians at the University of Florida. As part of their internship, the student's goal was to create and implement outreach strategies geared towards international students.*

*The poster discussed three things. First, it focused on the intern's benchmark analysis of outreach strategies at other state and peer institutions and the various outreach strategies consequently proposed by the intern. Second, it discussed the outreach strategies devised by the intern that had been implemented during International Education Week in 2018 and 2019, ranging from a book display to an international film festival.*

*Third, it focused on what had been learned from this experience: learning how librarianship differs between France and the US, gaining mentoring, supervisory, and project management skills, as well as strengthening a library's relationship with international students and an international library school. The poster also mentioned how the work accomplished during this collaboration had impacted the work done in 2020 during the Covid-19 pandemic to reach out to international students and more.*

- **Cooperative Collection Development: Current Practices for Area Studies**  
Brian Vetruba (University of Minnesota)

*Using results from a 2020 survey sent to librarians at ARL institutions, this poster provided a composite view of current cooperative collection activities for area studies and foreign language collections. Data for the type of cooperative collection initiative and collection criteria used, as*



*well as languages and formats included, were shared. The poster also noted librarians' attitudes and opinions regarding cooperative collection development, especially its benefits and challenges.*

- Considerations for Building Special Collections in a Consortial Environment  
Rachel Makarowski, Katie Gibson (Miami University, Ohio)

*This poster examined building unique and rare collections for a special collections department in a consortial environment in the United States. Responsible members of a large state-wide consortium must consider all issues of acquisition, cataloging, collaboration with subject librarians and other subject experts, teaching and outreach, opportunities with shared collections, and consortial lending and interlibrary loan.*

- Two Institutions, One Collection: A Success Story Told with Data and Documentation  
Heidi Madden (Duke University, North Carolina), Joanneke Elliott (University of North Carolina, Chapel Hill), and Justin Clark (Harrassowitz)

*European Studies faculty conduct research across the humanities and social sciences in global contexts, no longer identifying as working in a single discipline, region, or language. How can a library maintain PhD level collections on canonical topics, while also procuring materials for diverse, interdisciplinary, and transnational research? Duke University and UNC librarians combined their budget power to build one local collection in German Studies.*

- Data Management for the Humanities  
André Wenzel (University of Chicago)

*Research Data Management (RDM) is a very current and important topic for universities; however, most of the time the Humanities are left out of the frame. More attention needs to be paid to the data produced by Humanists and how librarians are supporting them in the retention of their data.*

- A DH Model Kit: An Experiment in Team Building with Arts & Humanities

Liaison

Morag Stewart, Elliott Stevens, Deb Raftus, and Theresa Mudrock (University of Washington)

*This poster described how the University of Washington Libraries Arts & Humanities Liaison Team had used a Digital Humanities (DH) project to get to know one another, to learn about DH, and to explore the ever-changing role of librarians in the research process. Collaborative learning is energizing and creative, while a real project creates structure, purpose, and deadlines. A team-based organization can build trust, minimize duplication of effort, and pool expertise to sustainably offer new services and meet the needs of our academic communities.*

- New Methods in Digital Libraries: Python Programming for Access to Online Materials

Ian Goodale (University of Texas, Austin)

*This poster examined two case studies of successful coding projects completed at UT Austin: first, PyGallica, a Python wrapper for the National Library of France's Gallica API, then a program for full-text extraction of documents available via the Europeana API. The poster addressed the ways in which working on such coding projects can help librarians better serve communities both on and beyond their campuses, assisting with research needs of faculty and students while opening doors for collaboration with international colleagues.*

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## Overview

A common thread of collaboration ran throughout this active and idea-packed session, which featured eight five-minute presentations, each followed by questions and discussions. Some key themes tying together the rich variety of poster topics:

Cooperative collection development in North American institutions to support European and other area studies programs as well as special collections: Different types of relationships have been developed, such as collaboration to share a single collection

between universities in fairly close proximity; collaborations among multiple universities to concentrate collecting in complementary areas; and communication between consortial members sharing a combined discovery tool. As the presenters noted, these arrangements can provide significant benefits, by supporting access to a greater range of subject areas, addressing collection gaps, and accommodating growing expectations of resources on subjects related to DEI, with the same or more restricted budgets—as well as increasing outside awareness of collection contents and strengthening professional bonds. To address practical challenges, recommendations included careful planning, maintaining written documentation, involving vendors in the process (sharing the same vendors can be useful), and regular review to keep up with changes in institutional collecting priorities, available budgets, levels of administrative support, and librarian assignments.

International collaboration: Projects described included professional mentoring through regularly scheduled online discussions, on a range of topics, between librarian colleagues in different countries (Finland and the U.S.); an internship by a French library and information science student at a U.S. university, which provided outreach to institutional faculty, students (including international students), and the local community; and two U.S.-based coding projects to support the use of collections developed by major European institutions through new Python wrappers that facilitate access to digital documents and images. While these key relationships and tools had been planned and carried out prior to the Covid-19 shut-downs, their value became even more evident as pandemic conditions brought about travel restrictions, a growing reliance on digital resources, and, overall, a crucial increase in the awareness of our international interdependence.

Digital humanities (DH); the role of librarians in the humanities research process: Presenters discussed considerations in designing librarian support for researchers in the management of humanities-related data—to make techniques and benefits of data management and metadata clear while reducing their intimidating associations—and lessons learned during a university DH project undertaken by a team of librarians working across institutional units. In these presentations, the value of collaborative efforts among librarians and with faculty went beyond the resulting content of DH products as such, as they build relationships based on complementary areas of expertise that can enhance future collaboration, as well as helping to develop project-

management skills. At the same time, with the expanding roles of humanities librarians can come the pressures of adding yet further projects on top of existing responsibilities, so means of addressing such challenges need to be explored.

## Conclusion

The New Shape of Sharing forum largely succeeded in its twin goals of bringing together librarians, book vendors, and publishing partners from North America and Europe and learning about shared interests and ways that libraries and librarians can collaborate. The presentations focused on three areas: bibliodiversity; the promises of digital resources to collections and research; and collaborative collection development. The forum concluded with a wrap-up session structured around the following questions:

- What are the lessons we've learned and how do they inform priorities?
- What are some ways we can address new challenges together?
- As you discuss these topics, what could be possible next steps, either collectively or for your own institution?
- What have you found useful, what have you missed, and what has always been missing from conference formats?

Addressing these questions highlighted several common threads that ran through the forum, while raising several areas for additional discussion and actions.

First, in today's global environment, libraries and European studies librarians value diverse collections and recognize the challenges of collecting and providing access to a wide range of non-English-language materials. Ways of defining this production include materials from small or non-commercial presses, non-traditional print formats, born-digital materials, and resources in national and regional languages, as well as works produced by authors from traditionally marginalized or underrepresented communities and on emerging topics or in new genres. Challenges include identifying and acquiring materials that represent the diversity of European publishing output. Non-standardized metadata systems and unstable or inappropriate terminologies are an obstacle to discovery and access. Institutional budget priorities may exclude or de-emphasize the importance of non-core collecting. Strong

partnerships between libraries and vendors will become even more important. Libraries may expand or alter approval plans to include specific materials, genres, or topics, and we may investigate additional formal and informal ways of working with vendors and one another. Acquisitions trips remain a key means for European studies and area studies librarians to discover and acquire diverse, niche, and unique materials for faculty and students at our universities—and to bring them to the attention of vendors. Foreign travel also allows librarians to establish and nurture our international networks.

Second, a diverse collection necessarily includes digital resources, and the shift towards the digital realm provides new opportunities for collections and for collaborations with researchers and other users. European studies librarians need to be proactive in seeking out non-English-language digital resources. Librarians must be familiar with how to locate, use, and provide instruction on the rich digital ecosystem being produced by libraries and archives in Europe; we also need to find ways to provide access to primary source databases as well as e-books and e-journals containing research produced in European countries. Research methods are expanding to incorporate digital materials, so libraries will need to find ways to evaluate, acquire or produce, preserve, and share text corpora and datasets. The scale of creating and working with text corpora and datasets provides opportunities for collaboration between libraries and between libraries and scholars.

Finally, sharing and collaboration were key themes that ran through the entire series of presentations. The sessions on collaborative collection development and assessment highlighted the goals of creating and maintaining diverse European studies collections and the challenges of incorporating digital resources and services for these fields. Participants gained insights into some of the ways that major North American consortia are working together to create collective collections, effective user services, and shared storage and preservation systems. In addition to logistical and technical challenges of shared resources, we discussed the potential impact of shared collections on vendors and publishers, as well as on the collections themselves. Will acquiring fewer copies of specialized materials open up opportunities to create deeper and more diverse shared collections? What are the limits on sharing digital resources? Will attempts at shared digital lending result in fissures or divides in the collective collection? How will sharing and collaboration influence libraries' collection strengths

and identities? What are the implications of collective or collaborative collections on infrastructure and services? Regional, national, and international consortia such as CRL will be crucial going forward, both for resource sharing and as forums for communication and information sharing. These partnerships generate innovative ideas for collection development and resource sharing, providing robust models for future collaborative work.

In conclusion, the New Shape of Sharing: Networks, Expertise, Information online forum provided a platform for collectively teasing out some key areas for potential collaboration for European studies librarians and the vendors and publishers that they work with. Together, we established objectives of creating diverse collections representing the range of political, cultural, linguistic, and scientific production of Europe's past, present, and future; responding to the opportunities of digital resources and new research methodologies; and especially, reaping the multiple benefits of working together to achieve these goals. We hope to continue these discussions with smaller working groups, concrete projects, and increased communication between librarians and vendors in both Europe and North America.



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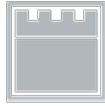
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