

An impressionistic painting of a landscape. A large, dark tree with dense foliage stands in the center, its trunk leaning slightly to the left. The ground is covered in a thick layer of colorful leaves in shades of purple, blue, yellow, and red. The background is a bright, hazy sky with warm tones of yellow and orange, suggesting a sunset or sunrise. The overall style is expressive and textured, with visible brushstrokes.

# Sustaining Art Research Collections:

## **Case Studies in Collaboration**

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# Sustaining Art Research Collections: Case Studies in Collaboration

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## FOREWORD

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Art research collections continue to be impacted by the lingering effects of economic uncertainty and the global COVID-19 pandemic, which resulted in reduced or stagnant budgets and staffing cuts. These impacts have coincided with a period of institutional reflection and examination of the fundamental role of cultural heritage institutions in society. Museums previously had coalesced around a definition that prioritized stewardship, acquisitions, conservation, outreach, education, and the advancement of scholarship in the arts. In this model, the art library fits seamlessly into the fabric of the institution, supporting the research of faculty, students, curators, and the community.

As the world grapples with issues like systemic racism, inequality, and the climate crisis, cultural heritage institutions have expanded the definition of museums to include fostering diversity, inclusivity, and sustainability.\* Embedding these values into the missions of cultural heritage institutions has rippled throughout the multifaceted work in which these organizations are engaged, including the work of the art library. Art research collections have embraced innovative ways to support these broader institutional efforts while advancing the field of art librarianship. These advances have been made in a complex context of institutional, technological, and global change in everything from new curatorial and pedagogical priorities, to changes in the information landscape, and rapid advances in technology.

In this new environment, art research libraries continue to develop relevant collections and support research while expanding to add new workflows like digitization, critical cataloging, web archiving, and metadata. This expansion of the work of art libraries ensures that they remain relevant within their organizations and to new audiences. However, embracing these new opportunities is not without challenges. It requires library staff to learn new skills and keep up to date with advances in libraries as well as in the technologies that are integrated into evolving library services and tools. The expansion of the role of art libraries ensures that they continue to be vibrant nodes of art information within the broader information network, but the work of this progress is often being done by fewer staff and with limited budgets.

Collaboration offers art libraries a way to innovate while maintaining—or expanding—core functions. Recent examples include the 2016–2018 National Digital Stewardship Residency (NDSR),† the

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\* Seymour, Tom. 2022. "What is a Museum? Icom Finally Decides on a New Definition." *The Art Newspaper*, 24 August 2022. <https://www.theartnewspaper.com/2022/08/24/what-is-a-museum-icom-finally-decides-on-a-new-definition>.

† NDSR created opportunities for new professionals to learn cutting edge digital preservation skills and share their learning with host institutions. <https://ndsr-program.org/about/>.

Collaborative ART Archive (CARTA),\* and Missouri Remembers: Artists in Missouri through 1951.† These grant-funded collaborative initiatives used creative and strategic thinking to reframe concerns about a workforce in need of new skills, important web resources being lost, and unique resources being siloed into opportunities that will support the profession's continued growth. *Sustaining Art Research Collections: Case Studies in Collaboration* illustrates how art research libraries were able to leverage access to their unique art-focused collections to address a lack of shelving space, consortia membership, or financial challenges that threatened the art library's existence. Despite different origin stories, the report finds that these partnerships not only provided a solution to a problem, but also created benefits like access to other collections, increased professional development opportunities, and even the expansion of professional networks.

The case studies presented here illustrate how partnerships can support sustainability and growth, and they also share case study participants' generous insights into the lessons learned from their experiences. The report provides recommendations like conducting an upfront analysis of the benefits that a partnership will provide to each participant, understanding the core mission values that a potential partnership would support, and ensuring that the effort required to create and sustain a partnership aligns with the partnership's benefits. This timely report offers key insights into successful and sustainable collaborations for practitioners who may be facing immediate staffing, technology, or space needs and provides a framework that can guide future collaborations that not only meet basic needs, but also advance experimentation and innovation.

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\* CARTA created a model for libraries to work together to capture and make accessible art-related archived web resources. See Collaborative ART Archive (CARTA). n.d. Accessed 2 April 2023. <https://communitywebs.archive-it.org/carta/>.

† Missouri Remembers is an artist dictionary project that brought together an art museum library, an academic library, and a public library to create a resource documenting the state's artistic heritage. See Missouri Remembers. 2023. "Home." <https://missouriartists.org/>.

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## INTRODUCTION

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This report is the second of two documenting the findings from the Operationalizing the Art Research Collective Collection project,<sup>1</sup> which explored collaborative opportunities and models for art research libraries. This report offers qualitative findings from case study research of existing collaborations involving art libraries, while the first report examined how quantitative analysis of library collection and resource sharing data can help identify and inform decisions about collaboration opportunities.<sup>2</sup> Since prospective partnerships can only become reality through the hard work of building and maintaining relationships, it is important to document the practical experiences and lessons learned from real-world collaborations. The selected case studies offer rich perspectives on how art libraries have built and maintained partnerships in a variety of settings to illustrate different partnership models that art libraries could adapt for use in other contexts.

Art libraries provide vital support to art scholarship within their own institutions and in the broader scholarly community. But art libraries face challenges from an evolving environment—conditions that, in many cases, have been accelerated by enduring repercussions from the COVID-19 pandemic and complicated by static or diminishing resources.<sup>3</sup> As the impact from both long-standing issues and more recent environmental changes is felt, finding sustainable pathways forward becomes a matter of increasing priority. And an important option for art research collections in achieving long-term sustainability is collaboration.

Collaboration can be a powerful strategy but one that requires intentional and ongoing investment. The recent OCLC Research report *Library Collaboration as a Strategic Choice: Evaluating Options for Acquiring Capacity* observes that, “[l]ibrary collaboration, in the form of multi-institutional effort to acquire needed capacity, is a choice. The decision to collaborate can yield distinct benefits, but not without an often-significant investment of effort, attention, and resources.”<sup>4</sup> The nature and extent of these investments will vary from collaboration to collaboration, from partner to partner within a collaboration, and are likely to evolve over time.

The unique profile of art research libraries and their role in the scholarly ecosystem means that they will have a distinctive set of considerations for evaluating collaboration opportunities and partnership value. This report examines examples of participation in collaborations and the factors impacting the success, challenges, and evolution of partnerships to help support art libraries and their leaders in the ongoing stewardship and availability of art research resources.



## OPERATIONALIZING THE ART RESEARCH COLLECTIVE COLLECTION

The concept for this report originated in a 2019 discussion<sup>5</sup> of challenges facing art research libraries between members of the OCLC Research Library Partnership (RLP).<sup>6</sup> The issues identified by the RLP include:

- An acute lack of space at art research libraries
- Difficulties in arranging for off-site storage of art research print collections
- A lack of knowledge regarding the library collections of peer institutions
- The value of art libraries partnering with other types of libraries on the shared management of print collections

These conversations inspired Operationalizing the Art Research Collective Collection, a research project exploring opportunities for collaboration between art, academic, and independent research libraries. The project is designed to identify new possibilities for collaboration and partnership models that support sustainable, ongoing availability of the rich collections of art libraries to researchers, wherever they may be. Elements of the project include:

- **Analysis of Collective Collections:** Examine the features of an art research collective collection to model how collection analysis can help identify opportunities for cooperation and articulate the value art research libraries bring to potential partnerships.
- **Analysis of Collection Sharing Patterns:** Identify patterns in resource sharing activity across art libraries and between art libraries and other library types. Analyze factors that drive current art research sharing practices and might inform future partnerships.
- **Exploration of Collaborative Case Studies:** Gather insights and lessons about the operational challenges, benefits, and practicalities of collaboration via case studies of art research library participation in partnerships and consortia.

This report addresses the third element, exploring collaborative case studies.

Understanding the opportunities, challenges, and potential strategies for cooperation between art, academic, and independent research libraries can help illuminate new collaborative models to support the continued availability of the art research collective collection. This project aims to help art libraries identify opportunities for beneficial partnerships around their collections, build effective collaborative structures to support these partnerships, and navigate the practical challenges involved in making collaborations sustainable.

## ABOUT THE REPORT

*Sustaining Art Research Collections: Case Studies in Collaboration* examines three case studies of library partnerships:

- A museum library's partnership with a neighboring university library that focused initially on shared access to and storage of library materials.
- A small art and design university's membership in a regional consortium with 20 other university libraries of various sizes and types, where the consortium serves as a source of community, shared infrastructure, buying power, professional development opportunities, and privileged access to each other's collections.
- A museum library's partnership with a neighboring university, which includes a shared staffing model, cataloging and ILL infrastructure, and reciprocal access to the collections of both institutions.

Taken together, these examples identify important characteristics of successful partnerships and document typical challenges and pitfalls when planning, implementing, or assessing a collaborative endeavor between libraries. Each case study presents a different model of collaboration with different types of organizations working together, different scopes of work and investment, and different governance and participation structures. They also highlight the unique value that art libraries can bring to partnerships and point to models for possible future collaborative efforts around building, stewarding, and sharing art research collections. The findings presented here can be leveraged by library leaders to inform decisions about collaboration opportunities supporting art research collections and in stewarding existing partnerships to greater success.

The first report, *Sustaining Art Research Collections: Using Data to Explore Collaboration*,<sup>7</sup> focuses on identifying collaborative opportunities for art libraries through quantitative analysis of collective collection and resource sharing data. This report, in contrast, marshals qualitative evidence from three case studies to better understand how collaborations involving art libraries are catalyzed, operationalized, and sustained. While the two reports can be read independently of one another, it is useful to highlight the important connection between identifying opportunities for collaboration on the one hand, and successfully leveraging those opportunities on the other. Although these issues are addressed separately in our reports, they are tightly linked in practice. Data-driven analysis can pinpoint potential sources of value in collaborative efforts, and examining collaboration as it unfolds in practice can reveal tested strategies for unlocking that value.

## **METHODOLOGY**

Our analysis examines three in-depth case studies exploring partnerships between an art research library and another institution or consortium: Museum of Fine Arts, Houston (MFAH) with Rice University (Rice); OCAD University with the Ontario Council of University Libraries (OCUL); and Worcester Art Museum (WAM) with College of the Holy Cross (Holy Cross). Case studies were chosen in consultation with the Operationalizing the Art Research Collective Collection project's advisory committee and selected to present a range of institution sizes and types, geographies, models of collaborative scope, governance, and participation structure. Participants from both entities involved in each partnership were invited to sit for individual interviews. The project team interviewed a total of 13 individuals across the three case studies: five from MFAH-Rice, five from OCAD University-OCUL, and three from WAM-Holy Cross.

Interviewees were asked questions about their role in the partnership and their understanding of its origin, along with details from their perspective about participation, governance, sustainability, potential future developments, and lessons learned from the collaboration. (See [full interview protocol in the appendix](#).) Interviews were conducted virtually and included the interviewee and three people from the OCLC Research team—a primary and secondary interviewer and a notetaker. Interviews were recorded and transcribed for analysis. The research team reviewed all the transcripts and took notes for each case study using a common template. Notes were shared across the research team for discussion to identify common themes across all case studies as well as the unique details of each case study. All direct quotes used in this report have been anonymized and edited for clarity as needed, and any editing of quotes is indicated in the text by use of ellipses and/or square brackets.

# Recommendations

Our case studies of collaboration and partnership represent different institutional contexts, goals, and geographic locations. Nevertheless, they all share the common thread of art libraries working with academic libraries to advance their mission of supporting art research. Art library leaders and leaders of institutions with which art libraries might form partnerships will find these recommendations especially valuable. However, this report's insights will be relevant to any library considering entering into a collaboration, in particular, specialized libraries that contribute distinctive value to a potential partnership.

This section offers a set of recommendations for building strong collaborations based on perspectives shared by interviewees across the three case studies. Each recommendation is distinct in focus, but their insights are interconnected and build on each other.

The recommendations can be read and understood independent of the case studies from which they are derived. However, we strongly encourage readers to engage with the individual case studies to gain a richer understanding of how the recommendations play out in practice. Equally important, readers will hear three inspiring stories of how art libraries have adopted collaborative approaches to meeting the challenges of supporting art research. This can help catalyze thinking about other kinds of collaborative opportunities, even when the partners and contexts are quite different.

## **Identify true need, contribution, and value**

To create a mutually beneficial partnership, it is vital to understand the contributions and needs each institution brings to the endeavor, as well as the value the partnership creates. As specialized institutions, art libraries often offer unique contributions, like collections and expertise, to their collaborations. Art libraries therefore need to clearly articulate the strengths they bring to their partnerships, and how those strengths align with the interests of their partners. Similarly, art libraries will bring unique needs to collaborations, which is equally important to clearly identify. It is critical for collaborators to understand the range of need, value, and contribution each will bring to a partnership, and make sure there is a good fit between the art library's strengths and its partner's needs and vice versa.

It is also important to be attentive to possible asymmetries in partner contributions and the value accrued through the partnership. Asymmetries in benefit and/or contribution may create an unequal commitment to the collaboration if they are not openly discussed and understood among partners. Such asymmetries do not mean a collaboration cannot be useful and valuable, but all parties involved should make a clear assessment of the power dynamics present across the relationships and discuss how they may impact the partnership.

Clear articulation of need, contribution, and value can also help participants advocate for their collaboration with other stakeholders in the partnership. Securing high-level buy-in from institutional leadership is an important ingredient for making collaborations successful and sustainable. When communicating with top-level administrators, it is important to speak directly to their priorities, highlighting the aspects of the partnership most likely to be important to them and

addressing the issues likely to be their biggest concerns. This is especially important in situations where leadership tends to adopt a “scorekeeper” mentality, viewing collaboration in a transactional way that focuses on return on investment. Participants will need to express the benefits of the collaboration in ways that resonate with that understanding of value, highlighting the unique contributions of partners and value that collaboration will create, especially if the partnership does not involve clear quid pro quo interactions.

## **Embrace creative approaches to collaboration**

Being open-minded and creative about collaboration can help the partnership achieve its goals and even evolve to include benefits beyond what was originally envisioned. Creative approaches to choosing partners, structuring partnerships, and interpreting value should all offer potential benefits that more traditional approaches might not.

Choosing partners creatively can lead to unexpected benefits and value. Look beyond similar or peer institutions to those of different sizes, types, and focuses. Differences between partners often give rise to valuable complementarities and fill local gaps in collections and expertise. This is especially important for specialized institutions like art libraries, where unique contributions to collaborations may be more beneficial than those from similar organizations.

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A creative understanding of a partnership’s value can expand the benefits that a collaboration creates and collaborators enjoy.

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Creativity in partnership organization or structure can also yield value. Some institutions might hesitate to implement a shared staffing model or agree to secondment of staff to a temporary assignment supporting a collaboration. These arrangements require each partner to give up some local autonomy. But they can also increase institutional investment in and commitment to a partnership, which in turn contributes to its success and sustainability.

A creative understanding of a partnership’s value can expand the benefits that a collaboration creates and collaborators enjoy. Look beyond the transactional value of a collaboration to take a more nuanced view of the intangible or less easily quantifiable benefits working with other institutions can offer, both now and in the future. For example, as staff from different institutions collaborate, their peer networks expand, as do their opportunities for professional development. Cross-institutional relationships connect local staff to an often-vast pool of expertise, knowledge, and experiences within their peer networks. Regardless of what other goals a collaboration is intended to accomplish, creating productive and lasting professional connections across institutional boundaries is a valuable byproduct of almost all collaborations. On a broader scale, an important intangible benefit of any partnership is the creation of a shared history of collaboration between partners that can be leveraged in the future. As staff from different institutions accumulate experience working together, a measure of trust and confidence in the relationship grows. This ends up representing an “option to collaborate” that can be exercised in the future—either on an

entirely new effort, or on extending existing collaborations into new activities. Part of the value of collaboration is *collaborating*, and this should not be overlooked when assessing the benefits returned from working with other institutions.

## Form strong bonds with shared vision

A shared institutional vision can catalyze valuable partnerships, even between institutions of different sizes and types. Identifying this shared vision often requires moving up from operational specifics to more conceptual views of mutual interests. A collaboration grounded in a shared vision that transcends a transactional view of a partnership's benefits may allow more scope for perceived asymmetries in the relationship. For example, a small, specialized library and a larger, better-resourced university library may find sufficient grounds for partnering, even if the pattern of contribution and benefit aligns unequally across the two institutions.

Geographic proximity, combined with a shared mission to serve the local community, can be an important impetus for institutions to engage in collaborative effort. Institutions may look for opportunities to embed collaborations within local networks of community institutions. Often, the leadership of local institutions like libraries, universities, museums, and zoos interact with one another at community functions and work together on civic or charitable committees and boards. This promotes interpersonal relationships among institutional leaders that can serve as the starting point for future partnerships and part of the glue that keeps it running. More than one collaboration has begun with a friendly conversation between two leaders.

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Collaborations based on a shared vision can expand the pool of potential collaborators and bring together unlikely partners in terms of size, type, and location.

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A shared vision can also extend to other stakeholder groups beyond a specific location, such as a mutual commitment to support a particular scholarly community. This might result in new partnerships to improve access to collections, expertise, and other resources for researchers in that discipline. In this case, the mutual interest that brings institutions together could transcend physical location, opening up opportunities for collaborations with partners well beyond the local community.

Collaborations based on a shared vision can expand the pool of potential collaborators and bring together unlikely partners in terms of size, type, and location. This offers institutions an opportunity to be innovative in selecting collaborative partners, seeking out partnerships outside of their peer groups. Large institutions can work with small ones, and specialized institutions can work with those with a more general mission. Regardless of the specifics of the partnership, the fundamental incentive for collaboration becomes a shared commitment to serving the same community—whether civic, scholarly, or both. Identifying and promoting that shared community commitment can be a benefit of the partnership in and of itself.

When considering opportunities for collaboration, be innovative in finding connections through shared vision or purpose. Once a connection is identified, invest in the effort to articulate and communicate it as an important element of the collaboration’s messaging to strengthen a sense of common purpose between the partnering institutions.

## **Manage change as collaborations evolve**

Few collaborations remain static over their lifetimes. New partners are added, some may leave, governance models are adjusted, and memorandums of understanding and objectives are amended. The evolution of collaborations over time should be an expectation on the part of every participant. Partners in successful collaborations will approach change intentionally by planning for and managing it.

One aspect of change management is having structures in place to regularly review the status of the collaboration and consider opportunities for expansion, course corrections, and other adjustments to the status quo. Have some elements of the collaboration outlived their usefulness? Are there new opportunities to create value through collective action among the partners? Collaboration is an ongoing choice, not a one-time decision. Partners should continually and intentionally choose whether and how to collaborate.

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not a one-time decision.

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Setting the scope of the collaboration is a key element of change management. Over time, this may involve expanding collective activities. For example, a partnership may begin as a resource sharing network, and then expand to include shared technical infrastructure, collective buying power, and professional development opportunities for staff at partnering institutions. While scope expansion can bring great benefit, it is important to manage it carefully to ensure that the expanded objectives are supported by adequate resourcing and commitment among the partners.

Adjustments to governance models are another important aspect of evolving collaborations. Relatively informal structures and decision-making processes might be sufficient for collaborations involving few partners and/or limited scope. But as membership grows and the range of activities becomes more complex, more formal structures and processes will likely be needed. Remember that governance models need to be optimized according to the nature of the collaboration they are intended to administer—if the collaboration changes significantly, then the governance model will likely have to adjust to these changes.

When making decisions about the scope, structure, and governance of a collaboration, be cognizant about making choices that lock the collaboration into pathways that cannot be easily changed, if at all. For example, some collaborations may face the choice of whether to transition their partnership into a separate legal entity. While this may have benefits, such as formalizing commitments and contributions, it is also a difficult choice to unwind should events reveal that the

transition was premature. And when change is needed, make sure all relevant voices are heard. For example, if there is a key centralized staff role in the partnership, make sure all partners have a say in any changes to its job description.

Partnering institutions need to put adequate time and effort into planning for change. Informal, irregular interactions between partners have some advantage in reducing staff effort in sustaining the collaboration. But they also diminish opportunity for engagement on strategic questions and for managing change proactively. Structured, consistent partner engagement—such as an annual partners meeting—is more conducive to an intentional approach to evaluation and planning.

In the same way, relying on informal, idiosyncratic methods for documenting procedures, workflows, and other knowledge related to the workings of the collaboration makes planning for change more difficult, especially if a person with key knowledge leaves their role and a new staff member must be onboarded. Invest the effort needed to ensure that documentation procedures are in place to sustain the collaboration beyond the tenures of its current members and to support planning for change.

## **Rightsize the collaboration**

An important aspect of collaboration is rightsizing the effort: ensuring that the scope of the collaboration's ambitions is commensurate with the commitment, investments, and interests of the partners. This is especially important for smaller institutions with fewer resources to invest in collaborative efforts—partnerships must be entered into strategically, with a keen sense of alignment between goals and capacity. Similarly, once a collaboration is underway, it is important to manage its scope attentively, balancing ambitions to expand the partnership's activities with a prudent avoidance of overreach.

Starting small is often a good strategy for launching a new collaboration. Multi-institutional partnerships do not need to address all potential avenues for collective action at once. A good choice is to begin with a well-defined, practical problem that collaboration can solve—for example, alleviating pressures on available space by sharing a high-density storage facility.

When a collaboration is in its formative stages, focusing on a specific problem can be much easier than trying to achieve consensus on a more ambitious agenda that strains the commitments and resources of an untested new partnership. Beginning with a simple, solitary objective does not preclude the partnership expanding to other activities in the future. Indeed, success in achieving the original goal can help build the foundations for collaboration in other areas by establishing a history of successful joint effort, mutual trust, and productive, cross-institutional interpersonal relationships. Growing an effective, sustainable partnership must start somewhere, and scaling up from a limited objective is often the best path forward toward deep collaboration.

It is important to emphasize that “stay small” can be a useful corollary to “start small.” A partnership can address one need and address it well. It may not make operational sense to expand the scope. The best strategy may be to preserve the status quo, especially if expanding the collaboration would strain institutional commitments, dilute consensus on strategy and methods, and, ultimately, damage the ties between the partner institutions. Scale can sometimes run ahead of sustainability to the detriment of the collaboration.

It is worth noting that rightsizing a collaboration can apply to more than just the scope of its objectives; it can also apply to the structure of the collaboration itself. For example, instituting a complex governance model can be an obstacle to decision-making and overall progress, especially if participation in governance requires more effort than staff have time to invest. A balance may need to be struck between everyone having a say and having efficient decision-making processes. Contribution to the partnership is another area that should be rightsized: outsized expectations for participation run the risk of burdening staff who must still fulfill their local responsibilities. This is especially true when one or more partners have relatively small levels of local staffing. There are no universal answers to these questions. Choose the rightsizing strategy that aligns best with needs, resources, timing, and other key aspects of the partnership.

## **Communicate effectively to collaborate successfully**

Sustained, regular communication is essential for making collaborations work. A continuous flow of information across partners helps strengthen engagement, manage expectations, and resolve issues. Like collaboration itself, communication takes place between people, so an important ingredient of good communication is a robust network of personal relationships across partnering institutions. Moreover, once relationships are established, they need to be cultivated and maintained or they can lapse.

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A continuous flow of information across partners helps strengthen engagement, manage expectations, and resolve issues.

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Relationships built over time and with regular communication help develop a rapport between collaborators, which can be valuable in addressing challenges and surfacing opportunities for extending or enhancing the partnership. Channels of communication can take many forms, from formal, intentional modes such as governance meetings or membership conferences to informal encounters such as personal conversations or group check-ins. Creating opportunities for staff from partnering institutions to be in the same room together may be enough to catalyze a valuable information exchange. It is important to note that communication is valuable at all levels of a collaboration, from leadership engaged in strategic discussions to staff in operational roles.

Good communication means being candid about problems that arise throughout the collaboration and creating an environment where those problems can be discussed openly. Communicating challenges early on is important and can help ensure that expectations among the partners remain in line with reality. Working with colleagues from partner institutions to resolve mutual challenges not only strengthens overall collaboration, but also cultivates a sense of trust that promotes good communication.

It is important to remember that keeping local colleagues informed about the collaboration is as important as communicating with partner staff, especially when it impacts their roles and responsibilities. Inform local colleagues about the nature of the collaboration and why it is important and solicit their feedback on the collaboration's local impact. Cultivating local buy-in and



institutional commitment to a multi-institutional partnership is an ongoing effort, especially during challenging times or after staff turnover. Good communication with local colleagues ensures that they feel informed and may help build a sense of personal stake in the collaboration's success.

## **Connect personally to collaborate institutionally**

It is common to talk about collaborations as partnerships between institutions, but it is important to remember that *people* initiate collaborations, manage them, and ultimately, make them successful. A collaboration's prospects for success often depend on having the right people in the right place at the right time. This means involving people with a collaborative mindset: that is, an openness to work across institutional boundaries, an appreciation of the value interinstitutional engagement can create, and an ability to communicate that value in compelling ways.

Since people make collaborations happen, personal relationships play an essential role. This is especially relevant when initiating partnerships—sometimes the seed of a collaboration begins when someone calls up a friend or acquaintance at another institution. Having collaboratively-minded institutional leaders with broad personal networks can be an invaluable resource in exploring partnership opportunities.

Because collaborations are fundamentally about people working together, the success or failure of a collaboration can depend on the individual personalities involved. A dynamic, committed individual can make a collaboration thrive, but someone who is skeptical of the value of collaboration or does not prioritize commitments to the partnership can be an obstacle to success. Similarly, unfilled positions in key decision-making roles can stall or otherwise thwart collaboration. Recruit and support people with a collaborative mindset and avoid arrangements that rely too heavily on any one individual. While it is tempting to let a “superstar” colleague singlehandedly drive a partnership forward, the departure of that person—due to burnout or another opportunity—could derail the collaboration.

While many leaders think about the sustainability of a collaboration in economic terms, there is an important “people element” to consider. Collaborations benefit from stability, with minimal turnover among the staff involved. This enables participants to cultivate productive working relationships based on knowing and understanding the personalities of their partners. However, change is inevitable and new staff will join the collaboration as it proceeds. Preserve local institutional knowledge about the goals and importance of the partnership—this is essential to supporting productive relationships among the people that sustain the collaboration.

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## CASE STUDY: MUSEUM OF FINE ARTS, HOUSTON—RICE UNIVERSITY

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### Introduction

The Museum of Fine Arts, Houston (MFAH) “connect[s] the communities of Houston with diverse histories of art spanning 5,000 years and six continents.”<sup>8</sup> Rice University is a comprehensive research university also located in Houston, Texas. In 2013, MFAH’s Hirsch Library formalized a partnership with the Fondren Library at nearby Rice University in which Hirsch would deposit up to 30,000 monograph volumes from its collection into Rice’s Library Service Center, an off-site storage facility. In return, Hirsch would extend borrowing privileges to Rice faculty and students, reciprocating an existing agreement where MFAH staff could borrow materials from Rice. The MFAH materials in Rice’s Library Service Center would be searchable in both the MFAH and Rice catalogs, and Rice would deliver requested materials back to MFAH through its courier service or via scanning.

Although the transfer of volumes from MFAH to Rice was intended to take place over five years (2013–2018), the partnership has continued without significant changes to the present day, with the reciprocal borrowing agreements currently the active aspect of the partnership. The transfer of materials from MFAH to the Rice Library Service Center ended up being less than originally planned and ceased completely right before the COVID-19 pandemic. There was some discussion of adopting a shared ILS system, but in the end the two institutions chose to implement separate systems.

At a meeting between the two institutions in 2019, MFAH raised the possibility of extending the partnership and resuming transfer of materials to the Rice Library Service Center. Rice agreed to this proposal, but to date, transfers have not re-started, in part because of the onset of the pandemic. However, there is an expectation that discussions about the partnership will occur in the near future after Rice installs a new Art and Architecture Librarian.<sup>9</sup>

### Origin story

The origins of the partnership can be traced to space pressures experienced at MFAH’s Hirsch Library stemming from collection growth and new construction that forced the relocation of some materials. In May 2012, MFAH’s Chief of Libraries and Archives Jon Evans informed the museum’s executive team that a serious issue with space limitations would become critical within three to five years. To address this, Evans reached out to Rice University’s Vice Provost and University Librarian Sara Lowman and proposed transferring a portion of Hirsch’s collection to Rice’s Library Service Center, an off-site, high-density storage facility. The institutions formalized an agreement to transfer materials from MFAH to the Library Service Center in 2013.

The initial contact from MFAH to Rice was not a “cold call” as the two library directors already knew each other. Moreover, Gary Tinterow, MFAH Director, and David Leebron, Rice University President, also had a good relationship. As one of our interviewees observed, having support from institutional leadership was important for launching the partnership: “The two heads of . . . the institutions were in sync that doing something collaborative together would be worthwhile.”

Another important factor in creating the partnership was Rice's preexisting disposition to find opportunities to work with other institutions in the Houston area. For example, Rice has extended borrowing privileges to staff at the Houston Zoo and the Holocaust Museum. One interviewee explained that these borrowing privileges are frequently extended to "places [with] researchers that have very small collections or very limited funding for libraries . . . [W]e've made arrangements for them to be allowed to borrow materials and use our library." Moreover, Rice already had an agreement in place with MFAH that permitted curatorial staff from the museum to borrow materials from Rice's collections. This existing MFAH-Rice relationship made it easier to propose extending the partnership to storage.

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"We have tremendous assets in our own institution, even though we're a much smaller entity, I see that there's . . . real value in sharing those with our community."

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The core element of the proposed partnership involved MFAH's use of Rice's Library Service Center storage facility. Rice operated the facility with the understanding that while it could not charge other institutions to use it on a transactional basis, it could permit use of the facility to other institutions under some form of reciprocity agreement: as one interviewee described, "we can store things there if someone does something for us in return." Rice has refused storage requests from other institutions because of a lack of perceived benefit for Rice. But the MFAH proposal presented some tangible benefits to Rice: in particular, offering borrowing privileges for MFAH library collections to Rice faculty and students. This arrangement was the first time the museum had opened up its collections for circulation to outside parties. One MFAH staff member noted that this was "just unheard of for us, for sure," but "we have tremendous assets in our own institution, even though we're a much smaller entity, I see that there's . . . real value in sharing those with our community."

Rice saw several other potential benefits in establishing the partnership with MFAH. Rice University had recently established a new doctoral program in Art History, and access to MFAH library collections could support that program. In addition, Rice was interested in the possibility of humanities students securing internships or other professional experiences at the museum. There was also some discussion of future opportunities for shared collection development and strategies for making materials in both libraries more accessible to users. The partners agreed that MFAH would consciously try to avoid transferring materials that duplicated items in Rice's collection so that the stored MFAH collection would be complementary to Rice's holdings, especially in focused subject categories.

Other synergies amplified the partnership's attractiveness to Rice, including the relatively small number of volumes MFAH proposed to transfer (30,000) and the close proximity of the two institutions (less than a mile), which would make delivery of MFAH materials held at Rice's Library Service Center and requested by MFAH staff an easy process. And significantly, interviewees from both institutions emphasized an existing, informal collegiality among Houston-area institutions, and the value of relationships with the different types of libraries in the local community.

The MFAH-Rice partnership was born out of a practical, well-defined need—space pressures—experienced by one partner that the second partner could address. Among other factors, the ability of the prospective partners to move from this initial, one-sided need to articulate a mutually beneficial relationship—in the form of storage capacity, reciprocal borrowing privileges, and complementary resources that could support the academic and career needs of researchers and students—made the collaboration attractive to both parties.

## Participation

The partnership was formalized in a five-year agreement where MFAH would transfer 30,000 volumes, or 6,000 volumes per year, to Rice’s Library Service Center facility. These items would be available for circulation both to MFAH staff and to Rice faculty and students. New records for Library Service Center-stored MFAH materials would be added to the Rice catalog. Rice also created (and regularly updates) new patron profiles for MFAH users and a new circulation policy that governs MFAH access to the stored material.

Interviewees from the MFAH-Rice partnership repeatedly expressed that staff’s participation focused on the practical problem of implementing the commitments outlined in the original agreement. “I would describe my role in it as ‘make it work,’” noted one interviewee, while another characterized their institution’s participation as ensuring that it continued to hold up its end of the partnership. In this sense, most of the activity supporting the partnership occurs among staff managing the systems and workflows underpinning its ongoing operation.

For example, significant effort is expended creating and updating MFAH patron profiles in Rice’s system. New records for the transferred materials need to be created and added to the Rice catalog based on bibliographic information sent over by MFAH. Custom software was needed to create interoperability between Rice’s ILS and the software used to manage the Library Service Center. Duplicate detection processes need to be monitored to identify MFAH materials that duplicate Rice holdings and to cluster MFAH and Rice copies under one title. Requested materials need to be scanned or physically delivered. Circulation policy requires staff intervention to address requests for MFAH items in storage if a Rice copy is available in the library.

The partnership encountered challenges when moving from concept to implementation, sometimes necessitating a resetting of expectations. Progress was often slower than anticipated, whether selecting and processing books for transfer or figuring out how to transfer MFAH patron and bibliographic data to Rice. Throughout, interviewees emphasized the importance of communication and interaction across institutional boundaries for making the collaboration work. As one interviewee explained, regular communication was “really crucial, especially early on having that forum for people to talk about how this project was affecting their work and what they thought could be done better.” These ongoing check-ins enabled both partners to identify issues as they arose and say, “we didn’t realize that was an issue. Let’s fix that and make it easier for you.”

In this sense, participation in the collaboration was not only doing the day-to-day work, but also investing the time to convene staff in the same room, get to know one another, and build relationships. One interviewee remembered that early in the partnership, staff from MFAH and Rice met every month, with Rice staff coming to MFAH or vice versa to “just talk about how things were going.” Ensuring that knowledge about the partnership transcended staff turnover was also important. Both institutions experienced staff turnover, making it crucial to keep everyone up to date, as well as preserve an understanding of the rationale for and value of the partnership.

Interviewees from both institutions noted that scarcity of staff impacted their ability to tend to the partnership. One person we spoke to identified staff shortages, along with many competing claims on staff attention, as the biggest challenge in making the partnership work: “That’s been one of the biggest drawbacks, the biggest problems, is suggesting more work for people who already don’t have enough staff.” At both institutions, the task of sustaining the partnership was distributed over many individuals—“parts of various people’s time”—although in some cases, this had a positive byproduct of incentivizing colleagues to work together more frequently.

An interviewee observed that the collaboration created some tension among colleagues, primarily because it sometimes created new problems to be solved, new ways of doing things, and new perspectives to be considered. A solution was to pay special attention to documenting policies and workflows in detail and “making sure those are updated and available in a place where people can consult them if they need to.” Another tactic was to cultivate an atmosphere where people were comfortable raising issues, airing out problems, and voicing frustrations, which could then lead to productive discussions of how to resolve them.

In contrast to the early stages of the collaboration, partnership meetings have been much more infrequent in recent years, and partly as a result, the collaboration has not grown. As one interviewee explained, “it’s clear that some of the things that we put on the table in terms of [a] shared OPAC, just didn’t materialize. . . . So in some ways, things have gone exceedingly well, and in other ways, we’ve made no traction whatsoever. . . . It wasn’t a regular, what I would call ‘ongoing relationship,’ to see, ‘how can we further what each of us is doing?’” Noting that the pandemic and pressing internal priorities were important factors in diminishing focus on the partnership, another interviewee remarked, “the collaboration didn’t end up being as deep as we thought it might be. . . . We didn’t really have a retreat or do any strategic planning with goals, and we probably should have done different phases.”

Although the partnership’s activities are currently focused on its original objectives, staff from both institutions expressed optimism that the scope of collaboration between MFAH and Rice could expand and evolve in the near future. As one interviewee put it, “I think we certainly have a positive relationship . . . and I think it would be a good thing to revisit what more we could be doing together.”

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“It’s always a good thing to know people at your other local institutions and have some kind of relationship with them.”

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Even as processes, policies, and workflows supporting the collaboration became routinized, and interaction between the partners diminished, it was nevertheless clear that the relationships built between MFAH and Rice colleagues were in and of themselves an important output of the collaboration: “it’s always a good thing to know people at your other local institutions and have some kind of relationship with them.” The strength of these relationships offers a foundation for extending, and possibly expanding, the partnership in the future.

## Governance

One interviewee described the MFAH-Rice partnership as a system that “runs pretty smoothly. . . . There aren’t a lot of decisions to be made. We have a collaboration, it’s been set up, it works.” In many ways, this response aptly summarizes the governance approach currently underpinning the MFAH-Rice partnership. There is a sense that the processes supporting the partnership in its current state are working as is. As this system has matured, regular interaction and consultation between staff at the two institutions has given way to a more irregular form of contact, taken up as need arises or a decision must be made.

While there seems to be no cross-institutional, collective evaluation of the progress or success of the partnership, there is some benchmarking conducted at the local level. For example, MFAH staff track numbers of materials stored at Rice’s Library Service Center facility per year, the circulation and other usage statistics for those materials, and gate counts of Rice-affiliated visitors to MFAH.

Big-picture decisions are generally made by senior leadership and then passed down to staff for implementation. Staff have the ability to “make suggestions, but we can’t really choose actions.” Another interviewee corroborated this, noting, “our upper-level folks sign off on the major partnership, but they let us more or less work out all of the nitty-gritty details.” However, interviewees also emphasized that the flow of communication was two-way, with front-line staff providing updates and feedback to senior leadership. For example, one person noted that while their library director would be responsible for deciding whether to formally extend the collaboration, that director would solicit feedback from all of their managers currently involved in the partnership before deciding.

Multiple interviewees described decision-making processes and structures as informal. A common approach was to convene groups of staff from both institutions, who would then make collective decisions. An interviewee observed that very few of these meetings were contentious: “everyone was very collaborative in spirit. . . . It’s more or less, we all have to agree that this is something that [we] want to pursue and do . . . some of those things have just worked out . . . very easily without a whole lot of more structure than that.” The reliance on group decision-making may stem from the fact that there is no single point of contact responsible for the partnership at either institution: each partner has multiple people interacting with colleagues at the other institution on different aspects of the collaboration.

The informality and lack of regularized structure for partner interaction that characterizes the governance of the MFAH-Rice partnership has the benefit of reducing the time and effort required to keep the collaboration working. This informality is well-adapted to the fact that relatively mature, tested processes are in place to support previously agreed commitments. However, this approach does reduce opportunities to engage in strategic discussions about the partnership and ways to deepen its scope.

## Sustainability

A factor that has contributed to the long-term sustainability of the MFAH-Rice partnership—now approaching 10 years—is that the partnership benefited from having several key staff members on both sides interacting consistently over a long period of time as the collaboration developed. One person we spoke to talked about the benefits of using partnerships such as this to build personal

networks with colleagues from other institutional backgrounds, remarking, “I think it’s good to . . . know other folks within your field, . . . just getting to talk to people and understand the concerns they have, the issues they’ve faced.”

At the same time, however, there have been some shifts in personnel, necessitating effort to acquaint new staff with the partnership, and “[make] the case for the partnership and what is beneficial to both parties.” Documenting processes, and keeping this documentation updated, is essential: “the most important thing and the most beneficial thing you can do [for] someone who might eventually replace you is to document as much as you can as you go.” One person we spoke to observed that some staff who took up a role in the collaboration after it had been in operation for some time seemed “somewhat less enthused” and “less supportive than we might like.” This interviewee stressed the importance of reinvigorating meetings and conversations interrupted by the pandemic, and making sure that both partners see the collaboration working for them.

An important aspect of sustainability is documenting the benefits gleaned from the partnership to make a case that the collaboration should continue. For example, a wealth of quantitative data could be extracted from various systems used to support the partnership that could provide evidence on the value of the partnership, including circulation data. For example, how many items from one partner’s collection have been borrowed by a patron from the other? Data such as this could possibly be extended to include estimates of the number of research outputs like published articles produced using these materials. Another suggestion involved assessing what the partnership amounted to in terms of supplementing or extending the local collection of each partner.

One interviewee emphasized the importance of collecting feedback from faculty and students who avail themselves of the opportunities the partnership offers, and in doing so, assess whether “we were really meeting the needs of some of the faculty or students.” This point was echoed by another person we spoke to, who observed, “if we have faculty members that really advocate for something, I think, to me, that makes it a lot more sustainable. There’s a reason why we’re doing it.” But in many cases, the value of the partnership may not be transparent to patrons, making it more challenging to document: “I think as long as . . . they can get things, I don’t think they really necessarily care if they came from the MFAH or they came from [the] storage facility or they’re here in the library.”

Much of what was discussed in terms of documenting the value of the partnership was hypothetical, in that such data was not regularly collected, if at all. One person we spoke to observed, “we need to develop better metrics in our library in order to make a better case to get funding. Because that’s how you get funding, . . . is data and metrics.”

Thinking about sustainability also brings to mind the alternative: changing the terms of or even ending the partnership. According to the current agreement, either partner can terminate the collaboration by giving 30 days’ notice, at which point MFAH would have nine months to remove its materials from Rice’s Library Service Center storage facility. The bibliographic records describing MFAH’s materials would also be removed from Rice’s catalog. However, staff from both partners seemed reluctant to place the relationship between the two institutions at risk: one interviewee noted, “we certainly want to maintain good relationships. They’ve got a valuable collection that they’re sharing with us. And yeah, we don’t want to jeopardize that.” Similarly, another interviewee observed, “If they start making some other demands of us, I don’t think that that would be totally unreasonable. So we would just need to figure out, what do we need to do to keep this, sustain this?”

It is significant that interviewees seemed to feel that regardless of the benefits perceived from the original agreement, the relationship between the two institutions is valuable and should be protected and preserved. This underscores that a key benefit from collaboration is creating a relationship that represents an “option to collaborate” that can be exercised in the future.

## Future

The future of the MFAH-Rice partnership is, at the time of our interviews, an unwritten book. While there is strong expectation that the current form of the collaboration—the transferred materials stored at Rice, the reciprocal borrowing arrangements—will continue into the foreseeable future, there is less certainty about growth in the scope of the partnership. An important source of that uncertainty was the unfilled post of Art and Architecture Librarian at Rice. It is likely that future collaborative directions for the two institutions will be heavily impacted by the interest and attention of the person who eventually fills this position.

Where should the collaboration go in the future? One interviewee from Rice mentioned cooperative collection development as a possibility, but noted that the impetus for moving ahead was diminished by a relatively weak value proposition, observing, “we really don’t have a big resource problem with our materials budget . . . it’s hard to think about ‘Why would I not buy this book if some faculty member wants it? I have the money.’ It’s hard to argue that. ‘Well, because they have it at the Museum of Fine Arts, Houston.’ . . . It’s hard to sell that if you have money in your own budget.”

Another challenge that may thwart future expansion of the partnership is a perceived asymmetry between the two institutions in regard to “need” for the collaboration. An MFAH staff member we spoke to emphasized that Rice staff have been “good partners, but they haven’t been drivers of a lot of this. And they’ve certainly done everything right in terms of supporting things, but I don’t think that they’ve been pushing for more. . . . Maybe they don’t feel like they need it and they’ve got lots of great things going on without it.” However, the same interviewee noted that Rice has, in recent years, made a renewed commitment to the arts, and hoped that this might serve as a catalyst for new opportunities for collaborative activities between the two institutions, noting that MFAH curators have often served as adjunct faculty at Rice.

But Rice staff clearly valued the partnership, including the importance of interacting with colleagues at MFAH, and the resulting opportunities to pool knowledge, exchange expertise, and create an informal professional network as a byproduct of the overall partnership. As one Rice interviewee put it, “I think that’s always valuable. . . . It is important to have those networks . . . Even if it doesn’t result in any direct projects, . . . I just think there’s a benefit to knowing people professionally as part of your network.”

Changing mindsets and dismantling silos across institutional collections can help expand opportunities to collaborate. Achieving seamless interoperability between systems is an important factor in this regard: for example, Rice and MFAH had discussed the possibility of expanding the partnership to include cooperative collection development, but efforts were hindered by the fact that the two institutions ended up choosing different ILS systems rather than adopting a shared one. Obstacles such as this mean that institutions need to be more innovative and intentional in finding ways to collaborate: “I think there just has to be a will to say, ‘You know what? Rather than us spending the same dollars on some of the same things, let’s see ourselves as a more holistic research community here so that [institutions in the Houston area] are thinking about ourselves as an integrated unit, and that way, we’re not spending the same dollars.’”



A corollary to this is that often new collaborative activities need to be catalyzed by a well-defined or even urgent need that drives the effort forward. When this clear need is absent, capturing attention and cultivating interest in a new collaboration can be difficult when people have little bandwidth to spare and their attention is focused on other priorities.

The future of the MFAH-Rice partnership has yet to be determined, but both parties attest to a strong foundation for future collaboration established by its previous activities. This speaks to the idea that working together on a collaborative effort—no matter how small or circumscribed in scope—creates a “track record” of collaboration that can be leveraged in the future. Growing an effective, sustainable cross-institutional relationship must start somewhere. Additionally, the expectation that future collaboration will depend in large part on the views of Rice’s new Art and Architecture Librarian is a good reminder that interinstitutional collaborations are, ultimately, collaborations between people, highlighting the importance of personal relationships in making collaborations successful.

## Lessons

The interviewees identified several important lessons they learned from their experiences with the MFAH-Rice partnership that can serve as good advice for making library collaborations successful.

**Emphasize good communication and relationship-building.** Regular contact between staff at the partnering institutions, especially during the early stages of the partnership, is crucial. Managing issues—even small ones—associated with a collaboration is much easier when there are trusted colleagues at partnering institutions to contact and work with to resolve them. Partners should invest in the “caring, feeding, and sustaining” of the personal relationships that form as a result of the collaboration, and view them as long term. As one interviewee explained, “it’s good for your users to have people at each institution know each other. . . . I just think ways to share information and resources . . . ways to just get people together . . . it’s important to have that sense of community.”

**Include as many people as possible in the collaborative network.** Effective collaboration networks are expansive and keep colleagues informed about updates to the partnership—especially internal colleagues whose work may be impacted in some way by its activities. Interviewees recommend erring on the side of inclusion: “There’s the whole too many cooks thing . . . But I think as many people that [are] manageable from different areas of the library [are valuable to include].” Cross-institutional partnerships can have unanticipated impacts on library units not directly involved in the collaboration, and it is important to maintain communication lines so issues arising from these impacts can be surfaced and addressed: “you’d never hear about those if you’re not talking to each other.”

**Be patient and flexible to make collaboration successful.** One interviewee stressed the importance of a “willingness to fill in the gaps and do what you can to not only make things run smoothly on your side, but also try to keep in mind that they’re dealing with their own issues on their side and doing what you can to help with that.” Change is inevitable over the course of the collaboration, including personnel, strategies, and even goals, so it is important to avoid “being too married to any specific way of doing something when you don’t know what might work best yet.”

**Articulate clear goals and expectations.** Establishing a shared sense of what the collaboration is expected to accomplish, and how, is an important factor in moving the collective effort forward. “I think you accomplish more when you know what your goals are,” observed one interviewee. In addition, collaborations should have clear plans in place to either sustain the collaboration or end it. An open-ended, ill-defined commitment to a partnership can create uncertainty and misunderstandings among those involved. As one interviewee explained, it is all about controlling expectations: “if you’re telling people it’s going to end, and it doesn’t end, that can upset people.” It is important to have an intentional approach to managing a collaboration’s future: “[T]hink through how it’s going to end if it ends. . . . Because if it’s not going to have . . . a set ending date, then maybe there needs to be some discussion about what keeps it active.” Partnerships should consider a periodic review or assessment exercise involving all of the partners, such as imagining questions a senior administrator might ask about the collaboration and formulating clear answers.

**Don’t let perfect get in the way of progress.** Not every original aspiration for the collaboration may turn out to be feasible, but that should not prevent other goals from being pursued. One person we spoke to emphasized, “it’s valuable to try to do things even if maybe all your goals that you had in mind aren’t met and every ‘i’ dotted and ‘t’ crossed, that it’s still valuable to try to do something.” A corollary to this is to make sure to take time to celebrate what has been possible to accomplish, or “embracing even the small victories,” as one interviewee put it.

**Don’t let the cost and effort involved in collaborating overshadow the benefits of forming partnerships.** Although collaboration is not without cost, or even sacrifice, this should not obscure the potential benefits that can emerge from collective effort. This point was nicely illustrated in a story one MFAH staff member related about initial concern about transferring materials to Rice and allowing them to be circulated to students:

[T]here was a lot of worry early on about, “Well, these are students and they’re going to not respect our books and they’re going to come back, they’re going to be damaged and there can be a piece of pizza in there that some kid put in there.” . . . I think we just need to give up on some of those old notions. . . . Yeah, that’s probably going to happen, and we probably have had a few things lost, damaged, or we couldn’t get back, but you know what? The value of sharing those for the maybe few hundred dollars that we had in lost or damage is so far outweighed by the benefits that I just think it’s unconscionable to think otherwise.

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## CASE STUDY: OCAD UNIVERSITY—ONTARIO COUNCIL OF UNIVERSITY LIBRARIES

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### Introduction

OCAD University, a public art and design university, is a longtime member of the Ontario Council of University Libraries (OCUL), a regional academic library consortium of 21 universities working together to “enhance research supports and create rich learning environments for Ontario’s diverse and growing university population.” OCAD University is the sole art-focused member of OCUL.

The other two case studies in this report focus on art museum libraries partnering with academic libraries. OCAD University’s membership in OCUL presents a rich opportunity to learn how an academic art research library functions in a large consortium with other types of academic libraries, including benefits derived from the affiliation, value contributed by the art library to the group, and challenges to be overcome.

### Origin story

OCUL was established in 1967 as the Ontario Council of University Librarians, primarily to support resource sharing among Ontario university libraries; a name change in 1971 replaced *Librarians* with *Libraries*. Collaborative efforts expanded from an initial focus on interlibrary loan to include initiatives around shared infrastructure, collective licensing of research materials, and professional development opportunities for staff on working groups and committees—and, in some cases, being seconded from the home institution to work temporarily for OCUL. Major OCUL initiatives include:

- Scholars Portal, which was uniquely conceived as the innovation arm for OCUL member libraries at a time when libraries were just entering the digital age. It provides member libraries with e-book and e-journal platforms, software hosting services, a repository of materials reformatted to support accessibility for library patrons with special needs, and an ongoing capacity for technical innovation.
- Collaborative Futures Project, which sought a collective management solution for OCUL member library collections, culminating in the 2019 implementation of Omni, a shared catalog operating on Ex Libris’s Alma Primo platform.
- Canadian University Reciprocal Borrowing Agreement (CURBA), which started as an OCUL initiative and since 2002 has allowed free reciprocal on-site borrowing by students and faculty at any Canadian university nationwide.

The OCUL membership consists of 20 publicly funded university libraries in Ontario as full members, plus the Royal Military College of Canada, a federal institution that is an affiliate member.

OCAD University is a public art and design university located in Toronto, Ontario. Established in 1876 as the Ontario School of Art, the school went through a series of name changes, including Ontario College of Art in 1912 and Ontario College of Art and Design in 1996, before being granted university status in 2002 and assuming its current name, OCAD University, in 2010. Attaining university status opened the door for OCAD University to join OCUL in 2003.

Membership in OCUL provides OCAD University with service infrastructure and buying clout that the university could not arrange on its own. Membership also provides the library's patrons with privileged access to over 60 million items held by consortium libraries and OCAD library staff with a ready-made community of peers. As one participant observed, "I think there's probably greater longevity for the art library in partnership with other libraries, than as a standalone entity . . . [art libraries] in some ways [are] less fragile or . . . can be more resilient in a collaborative environment." Another noted that, for OCAD University, membership opens up all the humanities in the areas in which they do not collect and can now have ready access—such as area studies, Indigenous cultural heritage, creative expression, storytelling—"so that's where the small library wins out."

In turn, other OCUL members value OCAD University's contributions to the consortium. This is due in part to the emphasis OCUL places on maintaining diversity in the types and sizes of libraries in the group and an appreciation of the specialized expertise and library materials that an art and design university brings to OCUL. One interviewee stated,

[O]ne of the things I really value about OCUL that's a little bit different than other . . . [consortia] I have been a part of, is that there is authentic and widely shared interest in supporting different kinds of smaller institutions. . . . [Smaller institutions] bring great value and a perspective on the wider higher education ecosystem that is important for all of us to understand in the consortia.

Another observed, "What I think is really important about having this diversity of institutions is the kinds of specialized focus that they can bring into the conversation, and, really, sometimes . . . that expertise sort of takes you by surprise." A third shared, "I think there is real potential for OCAD to bring forward deep expertise or lead in their area of focus beyond collections, perhaps if capacity isn't an issue." Several interviewees noted that an arts-intensive institution like OCAD brings specialized teaching and research collections to the consortial environment that benefit universities with relatively small art history and related arts curricula and may have limited collection resources on these subjects available to instructors and scholars.

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"What I think is really important about having this diversity of institutions is the kinds of specialized focus that they can bring into the conversation, and, really, sometimes . . . that expertise sort of takes you by surprise."

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Being in OCUL connects library directors to a support network of peer directors. This has proven to be especially valuable for directors of the smaller organizations (such as OCAD University) and/or those who are new to the position (as is OCAD's university librarian, who is just over two years in the position). One director said, "What I value is the structure of OCUL, the value in the partnership, the real friendships that get formed, and I have to say, there is an openness to speaking openly and an acceptance about hearing from a variety of institutions that I think is quite remarkable."

OCUL also provides staff at all levels numerous opportunities to collaborate with other staff across OCUL libraries. Staff may participate in specific communities of practice and committees, and there are built-in budgetary opportunities for staff to propose initiatives or projects that OCUL could take up if approved. “OCUL was structured with the vision that innovative idea generation or opportunistic solution-based problem-solving can be brought through its structure by any staff member to the benefit of all in the consortium,” one interviewee noted. “OCUL is not just a directors forum, then, but is deeply appreciated by our staff, too.”

OCAD University’s membership in OCUL is a mutually beneficial arrangement centered on proximity, community, trust, diversity, collaborative innovation, and shared access to collections and enhanced capacities that no institution could achieve on its own.

## Participation

For its member institutions, participation in OCUL means meeting a set of annual financial obligations, which includes involving staff in governance, committees, initiatives, and communities of practice and choosing which optional activities and services to sign onto.

All members participate by contributing funds annually in two tranches, one to support the OCUL budget (which pays, among other things, the salaries and benefits of the OCUL executive director and support staff), and the other to support the Scholars Portal budget (which pays the salaries and benefits of 26 FTE Scholars Portal staff members who are hosted by the University of Toronto and run more than a dozen services for the consortium). While there is a cost-sharing formula in place, smaller institutions such as OCAD University can find it challenging to meet the annual obligations.

Other fees are assessed depending upon which optional initiatives and services an OCUL member signs onto, with each initiative and service having its own cost-sharing model. For instance, the Collaborative Futures Project, which in 2019 culminated in the adoption of a shared catalog and resource sharing system by (so far) 18 OCUL members, has a subscription amount based on FTE of each subscribing institution’s staff, because the cost is based in part on Ex Libris’s site license pricing structure for the Alma platform. OCAD University recently joined the initiative and is enthusiastic about sharing their collections across the group while enjoying newfound access to the 60 million items in the OCUL collective collection, but joining came at a 50% cost increase from OCAD’s previous catalog. However, joining also allowed OCAD to have access to technical expertise available across the consortium. For instance, in service of the shared Alma implementation, one large OCUL university provided needed systems and programming guidance and support to some of the smaller institutions that did not possess that expertise on staff.

Other services have incentive pricing, where the more an institution’s patrons utilize that service, the less they pay. OCUL also acts as an opt-in buying club, negotiating licenses on behalf of interested members, who share the costs.

OCUL provides many opportunities for staff involvement at all levels, from front-line practitioner to library director. This is a highly valued benefit of membership. Some staff involvement is compulsory, such as directors voting as part of governance responsibility and member institutions devoting specific amounts of staff time to core services on a sliding scale. Directors and other staff may participate in three standing committees that focus on information resources, planning and assessment, and the Scholar’s Portal. In some instances, staff may work half-time in support of an OCUL initiative or even be temporarily seconded to OCUL full-time. Built into the governance

model are opportunities for ad hoc groups to come together to work on a particular project on a short-term basis. For example, there are intermittently active ad hoc groups focused on collections and the future of resource sharing, governance, truth and reconciliation,<sup>10</sup> and shared repository infrastructure. And there are 13 current “communities of practice” in areas such as accessibility, assessment, geospatial data, and video streaming where staff can network with peers and even plan, propose, and launch new OCUL initiatives. An initiatives fund is built into the OCUL budget to support approved efforts.

Smaller institutions with fewer staff, like OCAD University, may be challenged to find the bandwidth for participating in OCUL groups and initiatives. Still, OCAD’s new university librarian has joined a number of collaborative initiatives, looking to maximize relationships for the greater good of students and faculty. And, within OCUL, OCAD has the opportunity to enjoy the benefits of consortial outputs even when not represented on particular groups or initiatives.

A recurring theme in our interviews with OCUL leaders was the difficulty in finding enough people to participate and for people to find enough bandwidth to volunteer their time. One interviewee called the engagement of directors with the Executive Committee and standing committees “the coalition of the willing,” though another insisted, “I think it’s still very much central and part of the ethos of participating in OCUL.” A third said,

In many ways, OCUL has been the victim of its ambitions. There just aren’t enough people to occupy all those roles, so at times it was a real struggle to have folks serve, not because they didn’t want to; it’s just about capacity. So I would say . . . to use some care there, as you’re thinking about the need for standing committees and new initiatives and how they might be sustained and populated over time. This is part of OCUL’s current governance review and discussion with members.

Several interviewees noted that what OCUL represents to a member institution depends in part upon the size of that institution. Larger OCUL members will likely belong to other organizations, such as the Canadian Association of Research Libraries, the Association of Research Libraries, and the Canadian Research Knowledge Network. These larger libraries will also have more choices when it comes to selecting service and content providers. Smaller OCUL institutions are more likely to see OCUL as their go-to organization for networking, collaboration, and technical infrastructure. This is particularly true of OCAD University, which, due to its OCUL membership, now has access to a number of networking opportunities, pieces of infrastructure, and services that would be next to impossible to replicate elsewhere. This includes the 13 communities of practice, Scholars Portal, Omni (the consortium’s shared catalog and resource sharing system), opportunities to participate in big data projects, and “collaborative digital projects [that will] allow us to potentially create and host video or to host other content in ways that we wouldn’t be able to otherwise that . . . leverage our collections and our uniqueness.”

Interviewees also frequently reinforced that achieving the benefits of collaborating requires giving up some control. For example, one interviewee lamented that Scholars Portal resources aren’t branded so that local patrons will recognize that their home institution contributed to and supports those resources. An example specific to OCAD University concerned a major challenge faced by the university library when joining Omni, OCUL’s shared catalog and resource sharing system. In return for gaining access to 60 million items held by the 18 participating libraries, OCAD University (whose own local catalog contains 78,000 items) chose to make available many of its expensive and often oversized art and design books for borrowing for at-home use by any authenticated patron across the other 17 Omni institutions. For OCAD University, participating in this manner will be well worth any added risk to their own materials. Interdisciplinarity in art and other humanities makes

shared collections mutually beneficial to any institution supporting these disciplines. Having access to art research collections at the University of Toronto, a materials library that supports the design program at Toronto Metropolitan University, materials focused on Indigeneity at Lakehead University and Laurentian University, and area studies and history collections held all across the partnership will be a boon to OCAD University scholars. (Note that all but one of those examples highlights contributions to Omni from some of the smallest OCUL members.)

Participation in OCUL, then, includes meeting annual financial obligations, taking part in governance and a mix of compulsory and opt-in staff participation, extensive networking and professional development opportunities, and the chance for member institutions to avail themselves of a wide array of services, licensed content, and technical infrastructure provided by the consortium. The mix of large and small institutions brings a welcome diversity in points of view and also presents challenges due to the varying financial and staffing capacities of the membership. All of our interviewees indicated that the benefits outweigh the challenges.

## Governance

The OCUL governance structure is laid out in its constitution and by-laws, and the governing bodies are guided in their work by a five-year strategic plan (2019–2024). Essentially, OCUL is governed by the 21 library directors, with support from a five-person Executive Committee elected from among the library directors. One interviewee noted that the Executive Council is “responsible for making the business move forward, working closely with the executive director.”

OCUL directors gather twice a year, focusing on the budget in the first meeting and on operations in the second. Each of the 21 directors has one vote in deciding all matters that come before the group concerning OCUL. This is a bedrock principle of the consortium: affording smaller institutions, such as OCAD University, the same say in the management of the group as the largest institution. The Executive Committee consists of a chair, vice chair/chair elect, secretary, treasurer, and past chair. The OCUL executive director reports to the chair.

OCUL is not a legal entity. OCUL staff are employees of the Council of Ontario Universities and occupy office space in the University of Toronto Libraries. Scholars Portal staff are employed by University of Toronto Libraries.

The directors’ gatherings are intense working meetings. For instance, each OCUL service and initiative has its own cost-sharing model, the terms of which are discussed at each gathering. As new members have joined OCUL and services and initiatives have proliferated, the process of decision-making with 21 deciders has become increasingly unwieldy. Two years ago, OCUL initiated a systematic governance review, which is still underway, with an eye toward simplifying the governance structure and processes for reaching consensus.

Interviewees pointed to several underlying causes for the decision-making becoming cumbersome, such as the structure of administrative support for the Executive Committee. The committee chair serves for one year, spending the year before their term as vice chair/chair elect and the year following their term as past chair. One interviewee posited that one year as chair is insufficient for continuity or carrying through with various initiatives. Also, OCUL staffing levels aren’t seen as sufficient to support the Council in proportion to the consortium’s ambitions.

A promising decision-making model that is likely to influence OCUL's future structure governance is found in the Scholars Portal Operations and Development Committee. This committee combines consortial staff, practitioners from member libraries, and administrators into a single advisory body, bringing three important perspectives together to weigh in on every aspect of Scholars Portal plans and operations.

A governance review is currently underway. One thing that is certain to remain the same is that smaller members such as OCAD University will have the same voting power and the same opportunities for participating in OCUL's governance as its largest institutions.

## Sustainability

Membership in OCUL helps make OCAD University's library more sustainable in ways that are obvious (such as offering access to robust technical infrastructure, a broader base of expertise, and enhanced buying power), and in ways that are perhaps less visible (the ability to attract and retain faculty, students, and staff by privileged access to a vast array of research capacities and materials and plentiful professional development opportunities). OCAD University's ongoing presence in the consortium, in turn, enhances OCUL's viability, as does the presence of the other smaller members, due to the contribution of specialized resources and diverse viewpoints and areas of expertise.

OCUL began as a shared vision and has compiled an impressive track record of evolving to meet the emerging needs of its members, which bodes well for the consortium's long-term sustainability. OCUL started as a resource sharing consortium, evolved into providing licensing principles and infrastructure for accessing and preserving e-resources, expanded to supply a federated search capability for members, and eventually moved on to adopting a shared catalog and resource sharing system. Some OCUL initiatives became nationalized: for example, their research data management platform became Borealis, which is developing shared governance across the four Canadian academic consortia.

One interviewee pointed to staff having access to OCUL's communities of practice as a strong glue that helps keep institutions fastened to the consortium, with a financial as well as a professional development benefit:

One could look at [connecting to an expert community] as a substitute for professional development financing. If you don't have financing to send folks, . . . this offers an informal channel by virtue of the association.

The federal government provides transfer funding to each province, and the provinces determine how to allocate federal transfers meant for programs such as education, healthcare, and social assistance. One interviewee said, "In Ontario, as a university sector, we very much look to the province for cues in terms of political direction, areas of interest, etc. And we of course consider how best to align with those directions for continuing impact and support." Doing so collaboratively has the potential to increase that impact exponentially. Another interviewee said, "having those peers or colleagues who are working within very different institutions, that are all under the same kind of broad guidance and legislation in how they operate, is really useful."



We also heard about threats to OCUL's sustainability. For instance, in the current political climate, government funding for the university sector is almost certain to decrease, which will be felt most acutely by the smaller institutions. This is an indirect threat to OCUL, as the consortium is funded by the 21 member libraries, not the government. A more internal threat to OCUL's sustainability is the difficulty in balancing program growth, staff involvement, and keeping consortial costs manageable. The number of initiatives operating has grown substantially while OCUL membership, governance core, and administrative support have not.

As initiatives have proliferated, annual investments in OCUL by member institutions have also increased. The governance review will hopefully allow the 21 OCUL directors to better understand what they need to do to ensure sustainability as the consortium moves forward. One aspect that requires attention is assessing current and prospective initiatives and services and having a plan for sunseting them when the time comes. One participant shared, "When you have 21 voices around the table, it's really hard to say, 'Let's get rid of that.'" One interviewee found hope and inspiration in how the Collaborative Futures Project business model was developed: "That is particularly well done; it's really thinking through how decision making will work and what will be the long-term sustainability and how do partners exit and . . . all of that."

One participant identified a specific threat to the sustainability of OCUL, or to that of individual initiatives: if larger members consider an option that takes them out of the collaboration. Mutual trust and a shared understanding of the value of the cooperative have enabled the group to successfully navigate this challenge on multiple occasions. Another interviewee noted that "ongoing and regularized assessment of services is an imperative to ensure members see continued value or improvements to services when budgets are tight."

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"It's much more than just a financial benefit, it's not transactional, the work you get is not of a transactional value, it runs more deeply because it is more of a collegial collaboration."

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Looking at the flip side of the sustainability coin, we asked the interviewees what an exit strategy from OCUL would look like and got a unanimous response: something akin to contemplating the unimaginable. One comment was typical of the lot:

I would never even entertain the possibility of leaving a consortium like OCUL, just because of the way all of our services are knitted together. . . . I would be hard-pressed to find other options that work as effectively. . . . It's much more than just a financial benefit, it's not transactional, the work you get is not of a transactional value, it runs more deeply because it is more of a collegial collaboration. Where you have a shared vision.

## Future

OCAD University, like all the OCUL members who spoke to us, is committed to the consortium for the long haul because of the immense and ongoing benefit derived from the affiliation in terms of community, collection sharing, technical infrastructure, and buying capacity. Even if there were a desire to separate from the group (and there definitely is not), doing so would present an almost unthinkable difficult task, given the university's strong reliance on so many aspects of OCUL's offerings. The interdisciplinary nature of art and design research, for instance, makes continued support for patrons' access to a breadth of collections essential to the institution's core mission. As a small library with modest staffing and budget capacity, however, OCAD University will always need to consider with care which optional OCUL efforts they can draw sufficient value from and with which they will be involved.

Some aspects of OCUL's future endeavors are obvious.

- Finish and implement the governance review, simplifying the decision-making structures and processes.
- Balance innovation with cost and capacity.
- Continue to evolve services while also figuring out what assessment and sunseting will look like.
- Consider whether there are other services to be nationalized in the manner of the Borealis RDM platform.
- Explore whether the Collaborative Futures Project business model might serve as a template for other initiatives.
- Explore whether the Scholars Portal Operations and Development Committee might serve as a template for other decision-making bodies, with its vibrant blend of consorcial staff, practitioners from member libraries, and administrators.

Each change will have to be considered through the lens of how it will impact the ability of members to meet ongoing financial and staffing commitments—particularly the smaller institutions such as OCAD University, which tend to work within narrower margins for fluctuation.

One interviewee issued a dire warning about the financial outlook for universities in Ontario, and what will be required to navigate such potentially fraught economic terrain:

[T]he current government that's just been re-elected . . . does not have a track record of support for the university sector, so I think the budget pressures will continue. . . . OCUL needs to be very strategic in how we allocate our resources if we want to continue this evolution of shared technology; otherwise, we will fall into a trap of maintaining what it is that we have, which as we know is just a road to obsolescence.

Another insisted that it is time not just to revisit the governance structure of OCUL, but to also revisit the OCUL approach to innovating and the environment in which it takes place, with attention paid to when it is most appropriate to collaborate regionally, nationally, or globally.

In general, the interviewees see a bright future for OCUL. This quote is typical of what we heard: "I think OCUL will continue to thrive. The partnership is really strong. . . . When we talk to all the partners as part of our own governance review, everybody is very much attached. They have deep appreciation for the collaboration."

## Lessons

We asked our interviewees what advice they would offer to anyone embarking on an interinstitutional collaboration, and they were generous with their insights.

**Consider a partnership with libraries that are different from yours.** There are advantages to partnering with institutions outside one's usual peer group, as OCAD University has by belonging to OCUL. Doing so will bring diverse viewpoints, complementarities, and unfamiliar challenges that may give you a different perspective on your own. Every person we interviewed spoke eloquently of the value of bringing together those with various experiences, collection strengths and specialties, and eclectic areas of expertise. One interviewee observed, regarding the consortium's variety of institutions, "It can add a richness that wouldn't be there otherwise."

**Consider the business model and governance structure carefully and revisit them regularly as the partnership matures and evolves.** As initiatives have proliferated. Interviewees recommended having assessment methods and pathways to sunset services in place. A partnership should also be mindful of individual institutional power and influence and be deliberate about mitigating imbalances from the outset within the governance structure. As one interviewee said, "To have some clarity of governance and some confidence in governance, I think those would be essential to building trust, and without the trust, you're not going anywhere together."

**Don't bite off more than you can chew.** Collaborations should beware of asking too much of staff, having more ambition than resources, and having more governance structure than people who have time to be involved.

**Consider incorporation carefully.** Becoming a legal entity can greatly simplify governance processes but also be costly in time and money. Taking advantage of administrative structures within a member institution instead of incorporating can be cost-effective but may complicate partnership dynamics. Collaborators should think carefully in advance about what incorporating or not incorporating will mean for partnership costs, decision-making, and control.

**Be open to creative approaches and unfamiliar ideas.** Partnerships should fully explore what it will take to lean in and get to "yes." Examples include seconding staff temporarily to work for the partnership or allowing previously non-circulating materials to be borrowed by anyone at a partner institution. This may require pushing against one's own risk tolerance and putting aside a transactional mentality to further the collaboration.

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## CASE STUDY: WORCESTER ART MUSEUM—COLLEGE OF THE HOLY CROSS

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### Introduction

Since 2001, the Worcester Art Museum (WAM) and College of the Holy Cross (Holy Cross) have been in a partnership that includes reciprocal access to the library collections of both institutions, a collaborative staffing structure, and shared cataloging and other resources and services. WAM is an art museum with an encyclopedic collection, while Holy Cross is a private, Catholic Jesuit liberal arts college. Both are located in Worcester, Massachusetts.

Through the partnership, both institutions have access to each other's physical collections, and WAM has access to select Holy Cross electronic resources. WAM is responsible for the physical care of WAM collections and the library space within the museum, while Holy Cross provides cataloging and interlibrary loan (ILL) infrastructure for both collections. The WAM Library is staffed by one full-time librarian. WAM provides the funds for the librarian's salary annually and they are formally an employee of Holy Cross, with a dual reporting line to supervisors at both institutions. The WAM Library serves as the fine arts branch for the Holy Cross Library, and its holdings are included in the Holy Cross online catalog.

The partnership was formalized at its beginning through a Memorandum of Understanding (MOU) between the institutions. The agreement is revisited every five years, and the collaboration has evolved over time as the needs, resources, and programs of both institutions have changed. More change is on the horizon. The WAM Library will occupy a new space beginning in 2023, where it will be more visible and accessible to the general public. Both institutions have ongoing collaborations with the Worcester Public Library (WPL), which they hope to extend. WAM and Holy Cross are considering how their partnership may continue to evolve to support and include new audiences, relationships, and needs.

### Origin story

The current partnership began as an outgrowth of Bridges to Art, a grant-funded collaborative project between the two institutions in the late 1990s. At the time, WAM faced a challenging financial situation and WAM's director feared that financial pressures might cause their library to close or library services to be drastically reduced. To help support the library, the Bridges to Art program was envisioned to provide electronic access to the catalog and collections of the museum to both Holy Cross and WAM. The project funded important work to bring the museum into the digital age that it couldn't support on its own and acted as an investment in the future of the library program. It included a retrospective conversion of the WAM Library card catalog, digitization of slides of the museum's art collection, and metadata creation for the museum objects the slides documented.

The directors of the two institutions had a friendly relationship, and both recognized the value their institutions could draw from the collaboration. The permanent collection at WAM includes more than 38,000 objects from antiquity to present day, and spans art from Asia, the Near East, Europe, and the Americas.<sup>11</sup> The WAM Library collects broadly in the history of art to support the

museum's mission, exhibitions, and permanent collection. This expansive scope makes the museum and library collections a valuable tool for Holy Cross faculty teaching foundational art classes. The liberal arts curriculum at Holy Cross includes studies across the arts, humanities, sciences, social sciences, and interdisciplinary studies; arts-related majors include Architectural Studies, Art History, Dance, Film Studies, Music, Studio Art, Theater, and Visual Arts.<sup>12</sup> Online access to images and metadata about the WAM collections helped to make collections more accessible for teaching at Holy Cross and for curatorial, exhibition, and programming work at WAM.

The accomplishments of the Bridges to Art project showed that a collaboration between the two institutions could be successful and valuable, and laid the groundwork for the current collaboration. The ongoing partnership was negotiated after the grant project ended and formalized in 2001 through an MOU. The agreement calls for WAM to pay an annual fee to Holy Cross, which provides the salary and benefits for the WAM librarian, and for WAM to own and care for its library collection and space within the museum. Holy Cross formally employs the WAM librarian and provides cataloging and ILL infrastructure for the WAM collection. The WAM Library collections are available to Holy Cross faculty, staff, and students, and the Holy Cross library collections are available to WAM employees.

The agreement continues to support the ongoing sustainability of the WAM Library, the motivating concern of the original partnership between the two institutions. Use of the cataloging and ILL systems infrastructure provided by Holy Cross represents significant cost savings over running these services independently. The WAM librarian benefits from being part of a cohort of librarians at Holy Cross, a professional community they would not have access to as a solo librarian. Similarly, being a part of a larger staff means access to specialized skills across the library team, and coverage for weekend, sick, and vacation days that would be a challenge in a one-person shop.

Holy Cross draws significant value from access to the WAM collections. The WAM Library operates as a branch of the Holy Cross Libraries and is integrated into their service offerings to students and faculty. The college describes the arts as a vital part of a Jesuit, liberal arts education.<sup>13</sup> Because of the importance of the arts to the curriculum, art and non-art majors alike can benefit from access to the WAM Library. Faculty benefit from the larger relationship between the two institutions and voice regular support for the partnership, which informally gives them increased access to the expertise and collections of the museum as a whole.

Importantly, the partnership also aligns closely with both institutions' missions to be of service to their community. Holy Cross is committed to the Jesuit tradition of service to others and works to be of service to the Worcester community beyond its campus. WAM is dedicated to making art "central to the life of our evolving city, communities, and beyond"<sup>14</sup> and is especially interested in serving the large academic community across the 11 different colleges in Worcester. This alignment of larger purpose to be of service to the Worcester community is an important part of the long-term success of the collaboration.

## Participation

Participation in this collaboration revolves around two main components: the day-to-day work of running the WAM Library, and the ongoing communication, strategizing, and decision-making required to keep the partnership running smoothly.

The WAM librarian works at the WAM Library, located in the museum approximately four miles from the Holy Cross campus. They are responsible for the stewardship of the WAM Library collection and support reference, circulation, and instruction services from it to both communities. Holy Cross supplies intermittent additional staffing from student workers and part-time employees, and also provides support for specialized cataloging when needed. The WAM librarian has a dual reporting line to supervisors at both institutions. As an employee of Holy Cross, the WAM librarian is a member of the Holy Cross library staff reporting to the head of research, teaching, and learning, and participates fully in activities with colleagues there such as staff meetings and annual planning and goal setting. They also report to WAM's director of museum services, and participate in similar administrative, planning, and goal setting activities within the museum.

In terms of communication, the WAM librarian is in many ways the fulcrum of the collaboration. They are the one person embedded in both partner institutions and are vital to assessing and advocating for the WAM Library needs and keeping everyone informed of the collaborative program's status, changes, or challenges. And they must do this while keeping the contexts and needs of both programs in mind and in balance. The role's dual reporting structure can be tricky to navigate but all involved feel the benefits are worth it.

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As the partnership has matured, another valuable aspect of participation has become knowledge and expertise sharing across the institutions.

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Participation in the collaboration has evolved over time. When the partnership began, it was primarily focused on access to the collections. That scope has expanded through the years to include services around the collections like reference and instruction, and the role and expectations of the WAM librarian have similarly changed. The job description has been revisited and rethought to better reflect this expanded role and to better align with colleagues' roles at Holy Cross. One participant explained, "The role . . . has evolved. I think we've been able to draw out much more of the engagement, the reference, the research, the instruction side, around art collections and the kinds of materials that can be made available."

As the partnership has matured, another valuable aspect of participation has become knowledge and expertise sharing across the institutions. The WAM librarian benefits from being part of a group of librarian colleagues rather than working solo in a one-person shop, but it extends beyond one position and beyond the library. One participant explained, "I think for both institutions, just access to other professional colleagues is one benefit. Linking faculty to museum curators, linking the librarian at the art museum to librarians at Holy Cross and faculty at Holy Cross and students too . . . the sharing of intellectual knowledge I think is really important." Knowledge is also shared between the partners about the concerns and trends of their respective domains, helping each be more attuned to contexts and opportunities in higher education or museums that they might otherwise not recognize.

## Governance

The overall structure of the partnership is outlined by the MOU. This agreement is revisited every five years but has not been substantially altered since its inception. Beyond this formal agreement, there is regular communication and decision-making about goals and priorities. When asked what keeps the collaboration going, one participant highlighted the importance of this ongoing, shared aspect of governance: “what keeps it going [is] definitely good communication and a constant upkeep of priorities and every year setting goals together.”

The WAM librarian is in regular conversation with their two direct supervisors, and also interacts with both the WAM museum director and the Holy Cross library director with some frequency. The librarian participates in an annual planning and goal setting process with each institution and makes sure the goals laid out with each institution harmonize with each other. The two directors also communicate with each other beyond matters directly tied to the collaboration, especially centered on the big-picture landscape in museums or higher education or regarding funding opportunities.

Within the partnership, how decisions are made depends on the matters involved. For ongoing operational items, the WAM librarian usually decides by themselves or in consultation with their direct supervisors. When there are budgetary impacts, or major strategic shifts, decisions are escalated to the museum and library director roles, and sometimes the Holy Cross library director must get approval from the provost or others in the college. One interviewee called out the importance of having support and real knowledge of the collaboration at high levels of leadership in both organizations: “I think that having the leadership on board who’s willing to fully communicate and be very transparent about the future challenges, is also really, really important, because without [the Holy Cross provost and WAM museum director] being fully on board, then I don’t necessarily think that would continue.”

## Sustainability

Perhaps most important to the sustainability of the collaboration is the two institutions’ mutual commitment to the Worcester and regional community, and the alignment of mission and vision that flows from that commitment. One collaborator explained, “I think both institutions are very community-oriented. They definitely look outside of the scope of their campus to see how they can engage with the broader community. And I think that those are definitely two factors that make them want to collaborate and want to sustain this relationship.” The college sees the partnership “as part of the bigger role of the library and the campus to help facilitate other institutions in and around Worcester,” not just as a means of providing services to their faculty and students. And WAM sees the collaboration as a part of their “broader attempt to be a partner, not just for the College of the Holy Cross, but for all the colleges that are in Worcester, to be a shared resource.”

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On a practical level, participants cited the MOU as an important contributor to the sustainability of the partnership. Formalizing the agreement between institutions allowed the collaboration to continue beyond the friendly relationship of the founding directors as the institutions evolved and new leadership came into place. Clear and regular communication about the ongoing execution of the MOU and the issues that it does not cover have also been vital to sustaining the partnership. One collaborator explained the way the formal and informal aspects work together.

I think the close relationship of the two directors to start made it easy . . . to come together and talk about it, but formalizing the agreement legally, I think, really set it in stone. We're not just doing this for fun. We want this to last. . . . [K]eeping the lines of communication open . . . is really important. . . . [With less formal] frequent conversation . . . you develop a good relationship rather than meeting with somebody once a year or twice a year.

One interviewee urged consideration of what sustainability means practically and operationally, saying, "whenever you're talking about sustainability, you have to define what sustainability means." They went on to make an important distinction between being sustained on a level that allows an organization to function versus one that allows the organization to thrive. The current level of staffing that WAM can support for the library, even with the aid of a vibrant partnership, is largely survival level. All interviewees agreed that the WAM Library needs another staff position to thrive and to enact some of the ambitious vision that all parties have for it.

This raises a closely related issue of sustainability and understaffing. One interviewee explained,

We are extremely dependent on [the WAM librarian's] engagement and [they've] done a phenomenal job . . . but if you are dependent on one person's brilliance alone . . . you're meeting certain levels of sustainability and at the same time, you're not. . . . And not-for-profits have the bad habit of . . . building too much on the goodwill . . . of the workers.

Another interviewee, when asked about the sustainability of the current staffing level, confirmed that the current model is not feasible in the long term: "I think the pace that . . . we've been trying to run at is absolutely not sustainable, not even including the new things we wanted to take on as a library or as an institution."

## Future

The WAM Library's move to a new space in the museum is likely to bring about significant change for both the library and the collaboration. The library's new location is in the education wing of the museum, an active and public space that is accessible without paying admission to the museum. The new location's increased accessibility and visibility are likely to change the volume and breadth of people using the library and shift programmatic needs and priorities.

Similarly, both Holy Cross and WAM have been participating in successful collaborations with the Worcester Public Library (WPL) and there is great interest in exploring how bringing WPL in as a third partner in the collaboration might extend the impact of their work. Like WAM and Holy Cross, WPL is dedicated to serving the Worcester community but reaches a broader audience within it as a public library. WPL could offer different infrastructure, collections, and expertise to a collaboration, along with its connections to the community. One collaborator explained that, especially with the newly increased public access to the WAM Library, it is useful to think about the three institutions and "ways in which they could complement each other with respect to services and programming."



Even without a major shift like adding a third collaborator, the partnership's MOU is likely to be revised in its next review. Interviewees expressed a need for it to better reflect the current partnership, spelling out details that are currently informal, and accounting for the major changes since the MOU was written in 2001 in the way that library materials are accessed and used. Further stabilizing and expanding funding for staffing the WAM Library is a related issue that all collaborators identified as a priority for the future.

## Lessons

Our interviewees offered clear advice for others interested in building successful interinstitutional partnerships.

**Mutual understanding of value and need is vital.** When considering a potential partnership, interviewees advised having a clear sense of the value and needs you might bring to a collaboration, and those of your potential partner. Just as important as understanding potential value and needs is the willingness to communicate frankly and productively about them. One interviewee emphasized the importance of such conversations and the foundational understanding that they can build:

[It is] very important, having this conversation with the potential partner about what their needs are, so that you can come to a good agreement as to how the two will really complement each other. Making sure that the entanglements, the entangling alliances don't draw you down a path you don't want to go and be very honest about what those risks are if you're going to commit to some of those, so both parties understand what the other person is risking in order to make something successful.

**In any partnership, there is risk involved as well as potential value to be gained.** The goal of having a clear understanding of the risks and benefits involved is not to avoid risk entirely, but to make sure that needs and benefits are complementary and that all parties are going into the relationship on an informed and equal footing. Additionally, clear and frank conversations are needed throughout a partnership at every stage of a collaboration.

**Cultivate leadership-level buy-in.** Another insight offered by interviewees was the importance of leadership-level buy-in for the partnership. There is support for the WAM-Holy Cross collaboration at the highest levels of leadership in both organizations. Support at this level has been key to sustaining the partnership over time. It has helped the people at an operational level of the partnership feel that they can be transparent about and get support through challenging periods, as well as bring forward new opportunities, allowing the collaboration to evolve.

**Be open to creative solutions.** Another lesson interviewees shared is the value of being open to creative approaches to issues. One interviewee conceived of the collaboration itself as a creative project, explaining the value of taking this approach.

[It's important] to just have an open mind and to make sure that any idea is on the table, . . . to just approach the situation as a creative endeavor because the partnership really is creative. . . . I think when you can approach something with an open mind and be willing to take risks and try things and know that things might not work, I think is really helpful for anybody that's working within a collaborative partnership like this.

Embracing a creative approach has let this partnership evolve such that it has, in some ways, transcended being just a collaboration between two organizations with distinct but complementary interests. All involved are invested in its success and in the sustainability and longevity of the WAM Library.

Because of the shared staffing model, Holy Cross is deeply invested in the WAM librarian position and collection. Representatives from both institutions voiced concern for the sustainability of the position and the need for additional staffing, both to better meet the needs of the library and to support the person in the librarian position and keep their workload realistic and feasible in the long term. Similarly, Holy Cross is thinking about building their own collection with consideration to what is held at WAM, indicating a long-term commitment to shared access to both collections. When WAM was planning a renovation to their building and considering the future of the library within the new facility, the director of the Holy Cross library was invited to sit on an advisory panel to weigh in on their discussion. The two institutions' willingness to be creative and to give up some local autonomy built a partnership that has deepened over time and will continue to evolve into the future.

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## CONCLUSION

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While the potential benefits of collaboration are appealing, the task of making it a reality can be challenging. Our case studies demonstrate that successful collaboration requires dedicated attention and effort. But the case studies also show that the return on this investment can be considerable, and in some cases, even transformative. The prospect of achieving significant benefits from forming partnerships makes collaboration a strategy that should always merit serious consideration. For many art libraries, collaboration may appear uniquely advantageous as a means of sustaining their mission as custodians and stewards of the art research collective collection.

Our case studies illustrate partnerships involving art libraries in a variety of contexts. We have seen art libraries join with partners to solve a storage challenge, to weather a financial crunch, and to gain access to capacities and resources that would otherwise be out of reach. In each case study, the art library in question joined the partnership to address a clear—perhaps even existential—need. Self-interest therefore plays an important role in each example. Yet equally evident is the careful attention to the give-and-take of successful, sustainable partnerships. This came through clearly in each case study, with the art library offering distinct value back to its partner or partners. This point is reinforced in the findings of the project’s first report, *Sustaining Art Research Collections: Using Data to Explore Collaboration*,<sup>15</sup> which analyzes art library collections and resource sharing activity to highlight some of the unique strengths that art libraries bring to their partnerships.

The idea of collaboration should not obscure its difficulties and obstacles. The case studies explored in this report highlight many challenges encountered in forming and sustaining partnerships, as well as a wealth of practical experiences and lessons learned in meeting and overcoming them. The stories of these three partnerships, and the wisdom shared by the participants we interviewed, can help inform future partnerships involving art libraries, but in many ways, are equally relevant to any institution seeking a collaborative solution to a local need. We are grateful that our case study participants were willing to share their experiences with us, informing the broader art library community and beyond of both the costs and benefits of multi-institutional collaboration.

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Members of the advisory committee:

- Jon Evans, Chief of Libraries and Archives, Museum of Fine Arts, Houston
- Rebecca Friedman, Assistant Librarian, Marquand Library of Art & Archaeology, Princeton University
- Roger Lawson, Executive Librarian, National Gallery of Art
- Autumn Mather, Head of Research and Learning Services, Loyola University Libraries (*previously Director, Ryerson and Burnham Libraries, Art Institute of Chicago*)
- Keli Rylance, Head Librarian, Richardson Memorial Library, Saint Louis Art Museum
- Lori Salmon, Head, Institute of Fine Arts Library, New York University
- Kathleen Salomon, Chief Librarian, Associate Director, Getty Research Institute
- Tony White, University Librarian, OCAD University

We would like to extend special thanks to our case study participants for generously sharing their experiences and insights through their participation in interviews and reviews of the case study drafts. Their contributions made it possible to synthesize a set of recommendations for building strong collaborations to support and sustain art research.

- Talia Chung, University Librarian and Vice Provost for Knowledge Systems, University of Ottawa
- Sandi Edwards, Assistant University Librarian for Research Services, Fondren Library, Rice University
- Jon Evans, Chief of Libraries and Archives, Museum of Fine Arts, Houston
- Denis Galvin, Assistant University Librarian for IT and Technical Services, Fondren Library, Rice University
- Joy Kirchner, Dean of Libraries, York University
- Sara Lowman, Vice Provost and University Librarian, Fondren Library, Rice University
- Rebecca Morin, Head Librarian, Worcester Art Museum, and Art Museum Librarian, College of the Holy Cross
- Beth Sandore Namachchivaya, University Librarian, University of Waterloo

- Joel Pelanne, Technical Services Librarian, Hirsch Library, Museum of Fine Arts, Houston
- Mark Shelton, Director of Library Services, College of the Holy Cross
- Michael Vandenburg, Dean of Libraries, Dalhousie University (*previously Interim Executive Director, OCUL*)
- Matthias Waschek, Jean and Myles McDonough Director, Worcester Art Museum
- Tony White, University Librarian, OCAD University

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Directors of the art libraries in the RLP provided valuable input during the early days of the project:

- Stephen Bury, Andrew W. Mellon Chief Librarian, The Frick Collection
- Jon Evans, Chief of Libraries and Archives, Museum of Fine Arts, Houston
- Emily Guthrie, Librarian, The Library Company of Philadelphia (*previously Library Director, Winterthur Museum, Garden & Library*)
- Roger Lawson, Executive Librarian, National Gallery of Art
- Autumn Mather, Head of Research and Learning Services, Loyola University Libraries (*previously Director, Ryerson and Burnham Libraries, Art Institute of Chicago*)
- Amelia Nelson, Director, Library and Archives, The Nelson-Atkins Museum of Art
- Susan Roeper, retired (*previously Library Director, Clark Art Institute*)
- Keli Rylance, Head Librarian, Richardson Memorial Library, Saint Louis Art Museum
- Kathleen Salomon, Chief Librarian, Associate Director, Getty Research Institute
- Heather Saunders, Dean of Libraries and Archives, Acadia University (*previously Director, Ingalls Library, Cleveland Museum of Art*)
- Kenneth Soehner, Arthur K. Watson Chief Librarian, Thomas J. Watson Library, The Metropolitan Museum of Art
- Heather Topcik, Director of Research Collections, Bard Graduate Center

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## APPENDIX: INTERVIEW PROTOCOL

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**Note:** The primary questions were asked of each case study participant; prompts were asked as appropriate.

### 1. Introductions

Please introduce yourself, your job title, and briefly describe your role in this collaboration / partnership / consortium.

### 2. Origin story

Please describe, to the best of your knowledge, the origins of the collaboration.

**Prompts:** How did the idea arise? What were the key motivations? Who was involved? How were participants selected? What were the stated goals? What can this collaboration help you do that you couldn't do before?

### 3. Participation

What does it mean to participate in this collaboration? What kinds of contributions need to be made (financial or in-kind) to keep the collaboration running?

**Prompts:** What are the benefits, both anticipated and unanticipated, to participating? What obstacles to participation have you encountered? What are things that went better than expected; what has been unexpectedly challenging? Describe a moment of crisis in the partnership and how you overcame it.

How have changing staff roles or responsibilities impacted the project, either positively or negatively?

Have project goals and participation expectations shifted over the course of the project?

### 4. Governance

How does the collaboration operate? How are decisions made and by whom?

**Prompts:** How are new members recruited/integrated into the group? How are disagreements resolved? How is the collaboration assessed and has anything resulted from the assessment?

Is there a defined exit strategy?

How are information about and expectations for the collaboration documented and disseminated?

### 5. Sustainability

What are the most important elements to making this collaboration successful and sustained?

**Prompts:** Can you talk about the relationship/network building that occurs among the partners as a result of this collaboration? How important are personal relationships/individual personalities to the ongoing sustainability of the collaboration?

What kinds of technical support and equipment have been critical to the success of the project? What are some of the key roles necessary for the success of the partnership? (e.g., administrators, system administrators, catalogers, collection managers, circulation staff, reference staff, marketing staff, etc.)

## **6. Future development**

Where do you see this collaboration going in the future?

**Prompts:** Will the range of services/capacities offered expand? Will the number of participants grow? What are the biggest challenges to sustaining the collaboration?

## **7. Lessons learned / advice for future collaborators**

Based on your experience with this collaboration, what advice would you give to art libraries looking to build multi-institutional collaborations?

**Prompt:** Does your experience with this project make you more or less likely to undertake a collaborative project in the future?

## **8. Closing**

Do you have any questions for us?

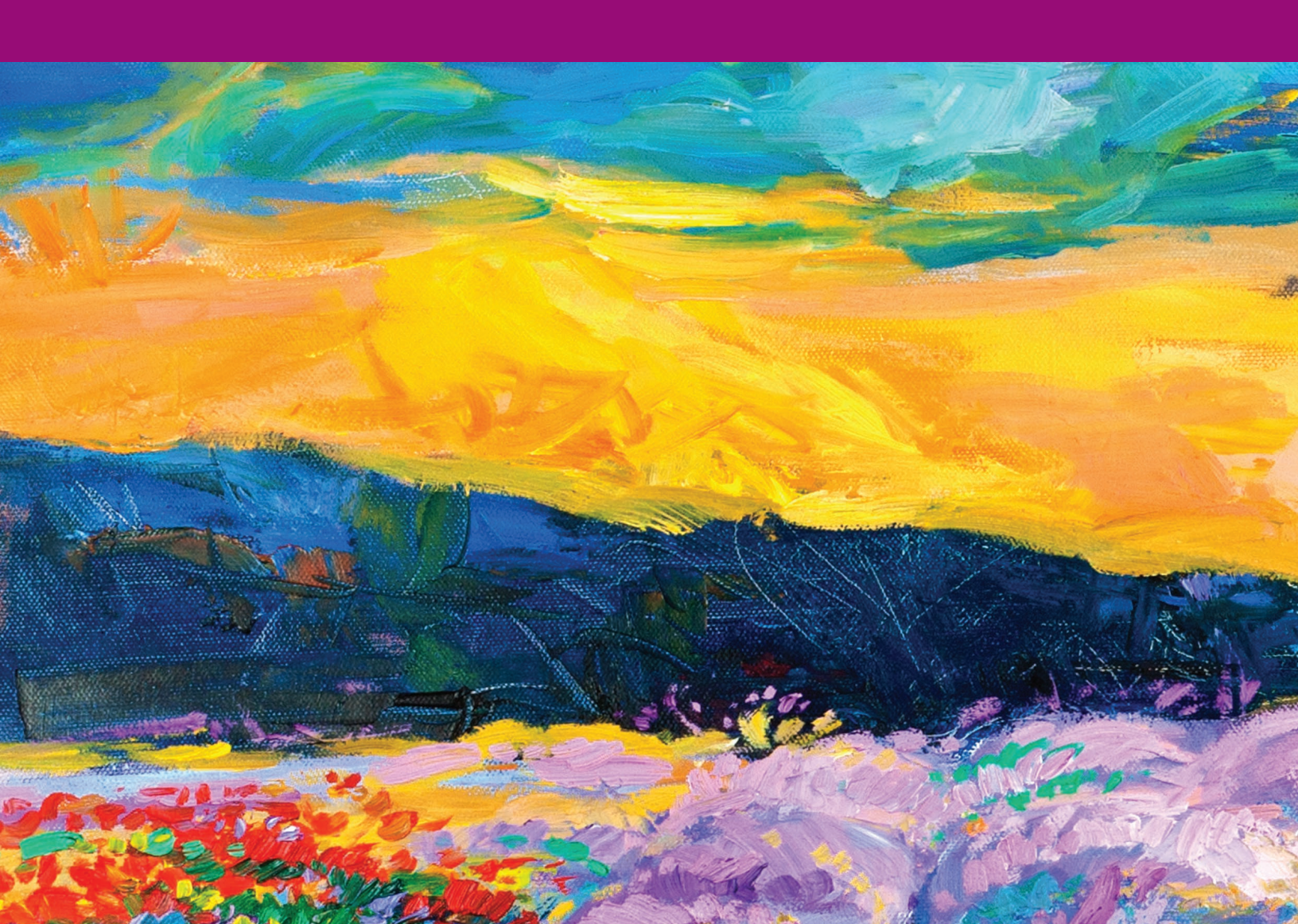


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