



Canadian Research
Knowledge Network

Réseau canadien
de documentation
pour la recherche

Introduction to CRKN

Clare Appavoo – Executive Director

Georgia Ashworth – Heritage Engagement Officer

John Aspler – Manager, Canadian Persistent Identifier Community

Amanda Holmes – Senior Licensing Officer

Allison Loveridge – Licensing and Member Services Officer

Percy Miller – Heritage Services Officer

crkn-rcdr.ca

About CRKN



Vision

The world's knowledge is accessible by all.

Mission

CRKN advances interconnected, sustainable access to the world's research and to Canada's documentary heritage content.

Strategic Objectives 2019-2024

2019-2024
Strategic Plan



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- 1: Transform Scholarly Communication
- 2: Develop and Foster Partnerships
- 3: Collaborative Advocacy

CRKN History

CNSLP Launched

Coordinated response to CFI funding opportunity with support of 64 universities

1999

2001

STM Site-Licenses Activated

ED hired and committees launched to lead the licensing process

2004

Introducing CRKN

CNSLP incorporates as not-for-profit and is renamed as CRKN. Board of Directors is formed

2007

HSS License Project Launched

Project launched with funding from CFI, provincial governments, and 67 universities to support digital content in HSS

2013

2013-18 Strategic Plan

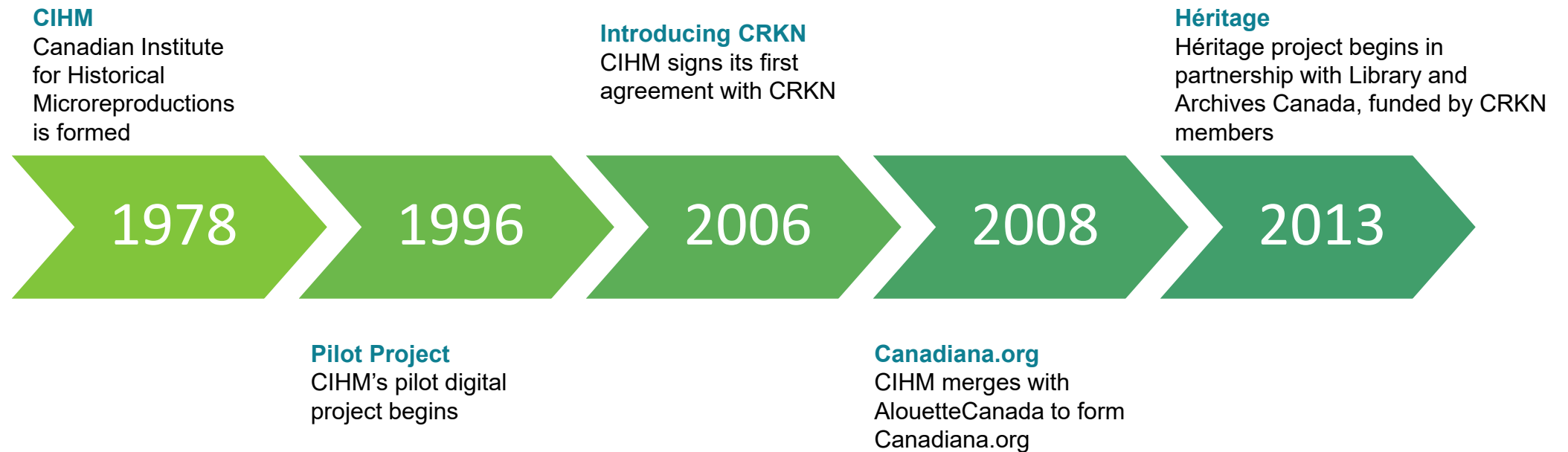
CRKN introduces new strategic direction:
Collaborating to advance digital scholarship

2014

Érudit Partnership

Transition from a vendor relationship to a partnership with Érudit

History of Canadiana



CRKN History

Persistent Identifiers

CRKN begins supporting the ORCID Canada Consortium, the first of several PIDs initiatives

2019-2024 Strategic Plan

CRKN launches a new ambitious strategic plan, the first to include its expanded portfolio

1st Transformative Agreement Achieved

CRKN successfully negotiates its first transformative agreement with a publisher, SAGE

2016

2018

2019

2019

2021

2022

CRKN and Canadiana.org Merger

CRKN continues its core licensing activities while expanding support for the digitization, access, and preservation of Canadian heritage content

Access at no charge

CRKN removes the paywall for access to Canadiana collections

Separation of Access & Preservation Platforms

Canadiana's access and preservation infrastructure is split, allowing for more flexible platform development

CRKN At-A-Glance



Over **50** volunteer Board, committee, and task group members.



Supporting **76** academic libraries and **5** research institutions.



Managing licensing expenditures of over **\$126 million**.

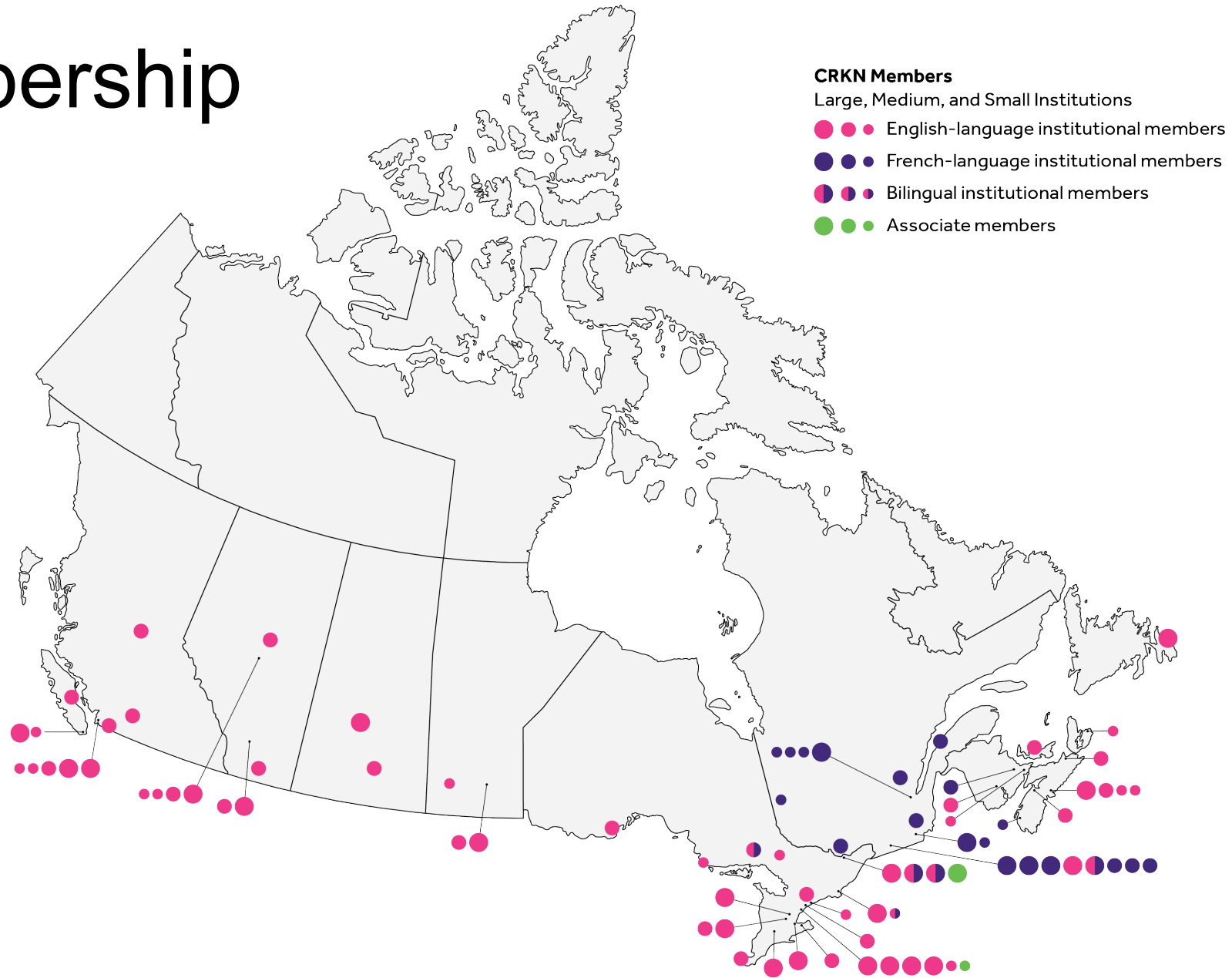


Preserving digital documentary heritage in a Trustworthy Digital Repository with **4** nodes.



Providing access to **62 million** pages of digital documentary heritage.

Membership



Membership Types & Fees



Institutional Members

- Open to institutional members of Universities Canada and LAC, TPL, and BAnQ as founding members of Canadiana.org
- 79 Institutional Members

Associate Members

- Canadian degree-granting, not-for-profit or government
- GLAM institutions
- Non-voting
- 2 Associate Members

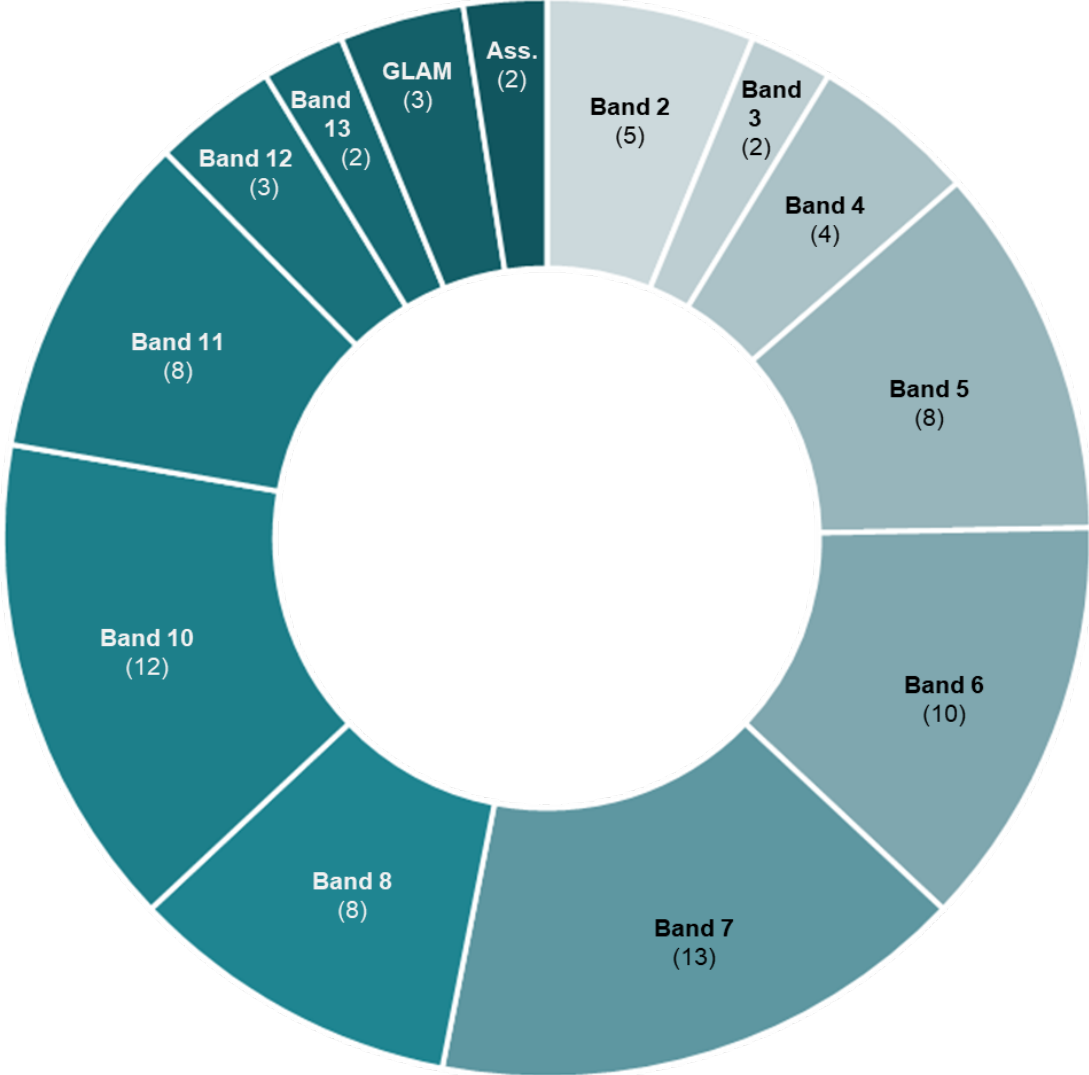


Fees

- Membership fees share the costs of operating the organization
- Heritage Content Access and Preservation (HCAP) fund contributions support heritage program
- License fees paid according to license participation

CRKN Membership Bands

CRKN Band	# of Members
Band 1	-
Band 2	5
Band 3	2
Band 4	4
Band 5	9
Band 6	10
Band 7	13
Band 8	8
Band 9	-
Band 10	12
Band 11	8
Band 12	3
Band 13	2
Non-Banded (GLAM)	3
Associate Members	2





Governance

CRKN Governance



Board of Directors



Not pictured: Maureen Clapperton

Board of Directors

Member	Role	Institution	Band
Annette Trimbee	Chair	MacEwan University	7
Melissa Just *	Vice-Chair Director (Large Institution)	University of Saskatchewan	10
Dale Askey *	Director (Western Region)	University of Alberta	12
Guyline Beaudry	Chair, CSC	McGill University	12
Bernard Bizimana	Director (Québec Geographic Region)	HEC Montréal	7
Susan Brown	Researcher/Administrator	University of Guelph	10
Camille Callison	Director (appointed position)	University of the Fraser Valley	6
Maureen Clapperton	Director (appointed position)	Bibliothèque et Archives nationales du Québec	-
Denis Cossette *	Treasurer (Researcher/Administrator)	Concordia University	10
Ken Hernden	Chair, PAC	Queen's University	10
Dianne Keeping *	Director (Atlantic Region)	Memorial University of Newfoundland	10
Catherine Steeves *	Director (Ontario Geographic Region)	Western University	11

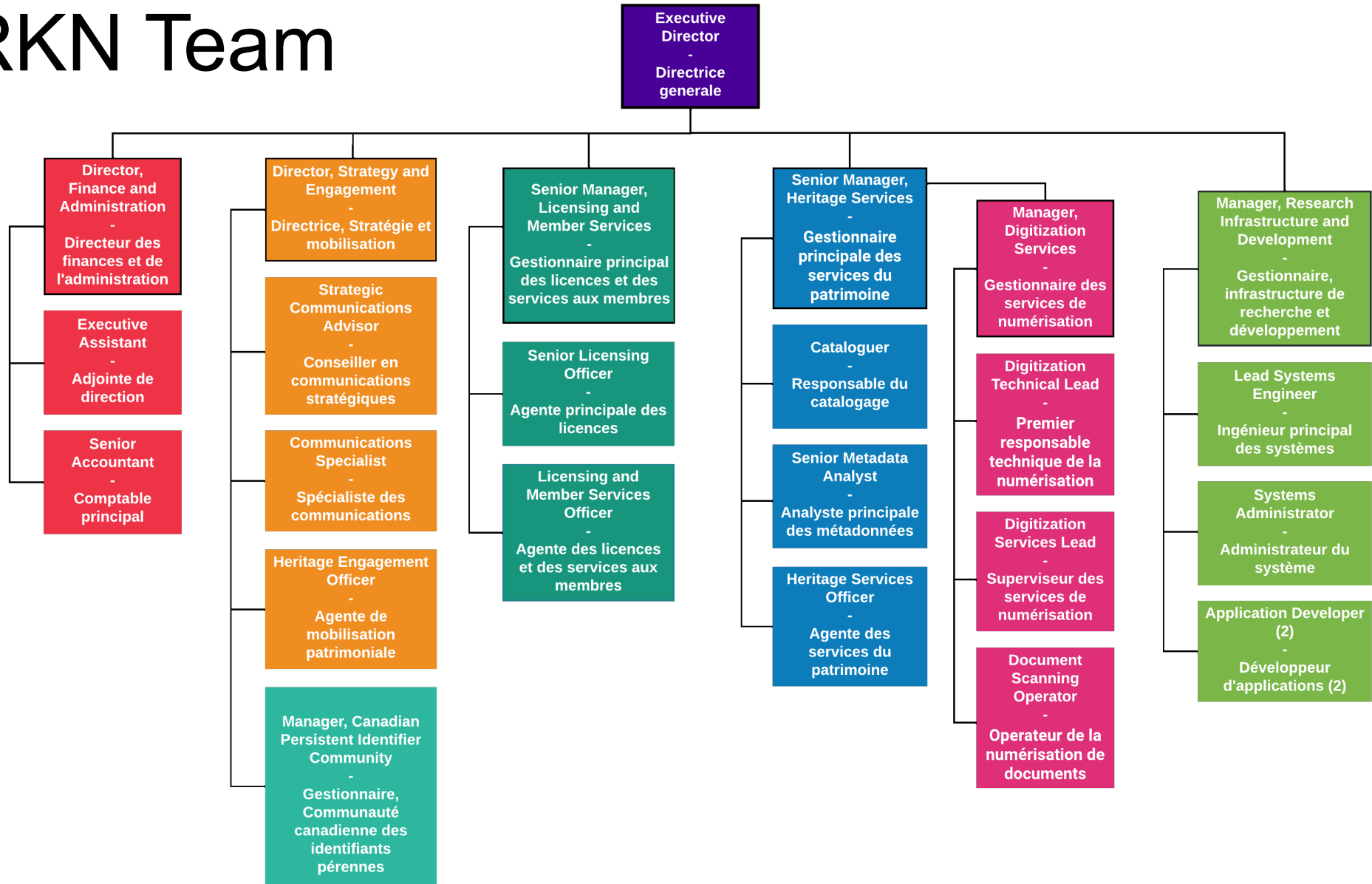
**Member of the Executive Committee*

Executive Committee



- Subset of Board members (5)
- Sets the agenda for upcoming Board meetings
- Advances activity between regularly scheduled Board meetings
- Oversees administrative and HR policies and processes
- Acts as the nominating committee
- Provides oversight of governance and succession planning

CRKN Team



CRKN Programs and Activities

- Content Licensing Program
- Heritage Program
- Partnerships and Collaborations
 - National Heritage Digitization Strategy (NHDS)
 - Persistent Identifiers

Content Strategy Committee

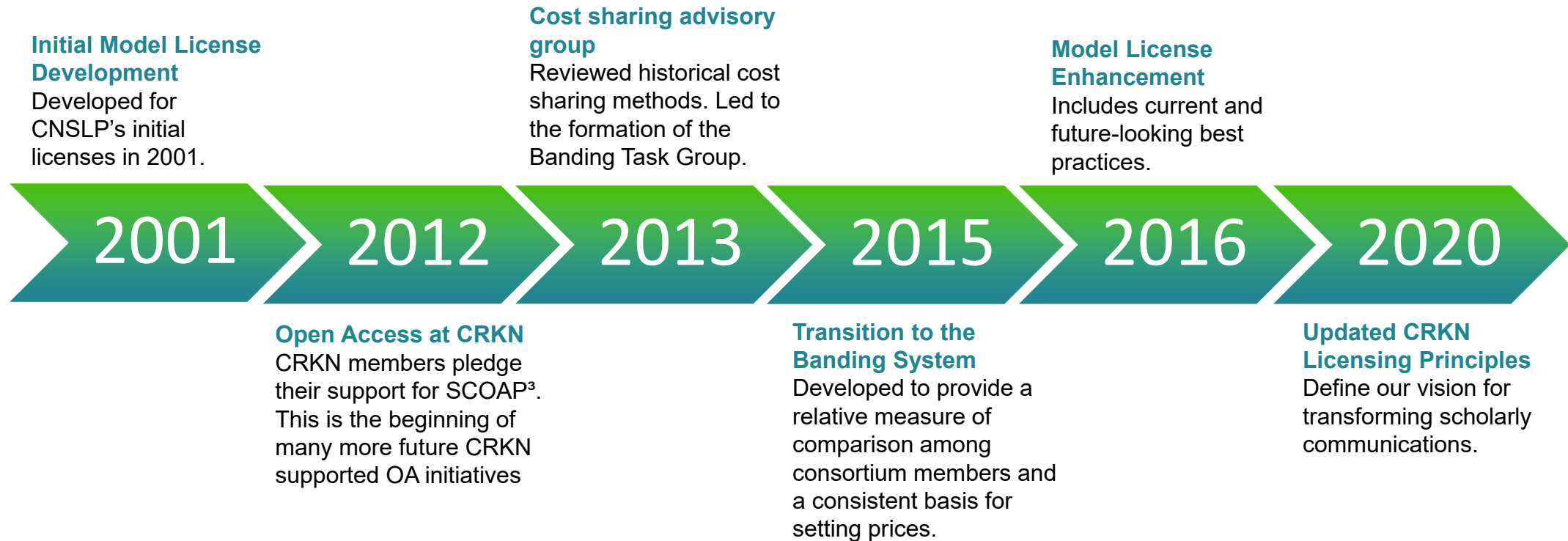


*Not pictured: Sheldon Armstrong, Jean Blackburn,
Khalid Jouamaa, and Joanne Smyth*

Content Strategy Committee

Member	Role / Region	Institution	Band
Guylaine Beaudry	Chair	McGill University	12
Lisa O'Hara	Vice-chair	University of Manitoba	10
Alison Ambi	CAAL	Memorial University of Newfoundland	10
Sheldon Armstrong	Observer	University of British Columbia	13
Jean Blackburn	COPPUL	Vancouver Island University	6
Louis Houle	BCI	McGill University	12
Khalid Jouamaa	BCI	Université de Montréal	11
Ian Robson	OCUL	Queen's University	10
Harriet Rykse	OCUL	Western University	11
Joanne Smyth	CAAL	University of New Brunswick	8
Sandy Stiff	COPPUL	MacEwan University	7
Weijing Yuan	Band Balance	University of Toronto	13

Evolution of the Content Program





Licensing Principles

- **Licensing Program Principles:** defines the ways members work together
 - Research outputs are a common good
 - Committed to a robust, sustainable scholarly communications system
 - Collaboration within the Canadian research community improves terms, and increases access to knowledge
 - Recognize the value of publishers while rejecting the oligopoly benefitting a minority
 - Committed to collaborate to transform the system to open scholarship, science and access
- **Principles for Negotiations:** expectations from our vendors and publishing partners
 - Sustainable Scholarly Communications
 - Equity of Access
 - Open Access Scholarship
 - Transparency

Negotiation Process



Licenses



E-Journals



E-books



Primary Source
Databases



Software



Services

Multiple Pathways to Open Access

- Partnership Models for Open Access Publishing
 - Coalition Publica, SCOAP³, OA2020, SCOSS, PLOS, MIT Press D2O
- Transitional agreements with publishers
- Lowering cost of Article Processing Charges (APCs)
- Reducing cost of commercial subscription agreements



Beyond Negotiations

Data Analytics

- Journal Usage Statistics Portal (JUSP)
- Unsub (individual and consortial dashboards)
- Publication Data Analysis



Standards Organizations

- COUNTER (Usage Statistics)
- NISO (Information Management)

1010
101010
1010

Member Services

Troubleshooting

- Support for access issues to licensed content
 - licensing@crkn.ca

Entitlements Management

- Title List (KBART files) management with Knowledge Bases
- Perpetual Access Entitlements (Tracking Project)

FX Services

- Offer members greater control and predictability for their budgets
- Forward contracts and USD invoicing options

CRKN OA Journals List

- Scholarly OA journals supported by CRKN Members
- Distributed to Knowledge Bases to increase discoverability

Knowledge Base Entitlements Sub-Committee



Knowledge Base Entitlements Sub-Committee

Member	Role	System Expertise	Institution	Band
Courtney Bremer	Chair	SFX	University of Waterloo	11
Andrea Bee	Member	Alma/Primo	University of Guelph	10
Melissa Belvadi	Member	EBSCO	University of Prince Edward Island	6
Tracy Chalmers Kitagawa	Member	SFX	University of Alberta	12
Allison Richardson	Member	Serials Solutions/360	Kwantlen Polytechnic University	7
Andrew Senior	Member	WMS (OCLC)	McGill University	12
R. Scott Shannon	Member	OCLC	University of New Brunswick	8
Wei Zhao	Member	Multiple	OCUL/Scholars Portal	-

Preservation and Access Committee

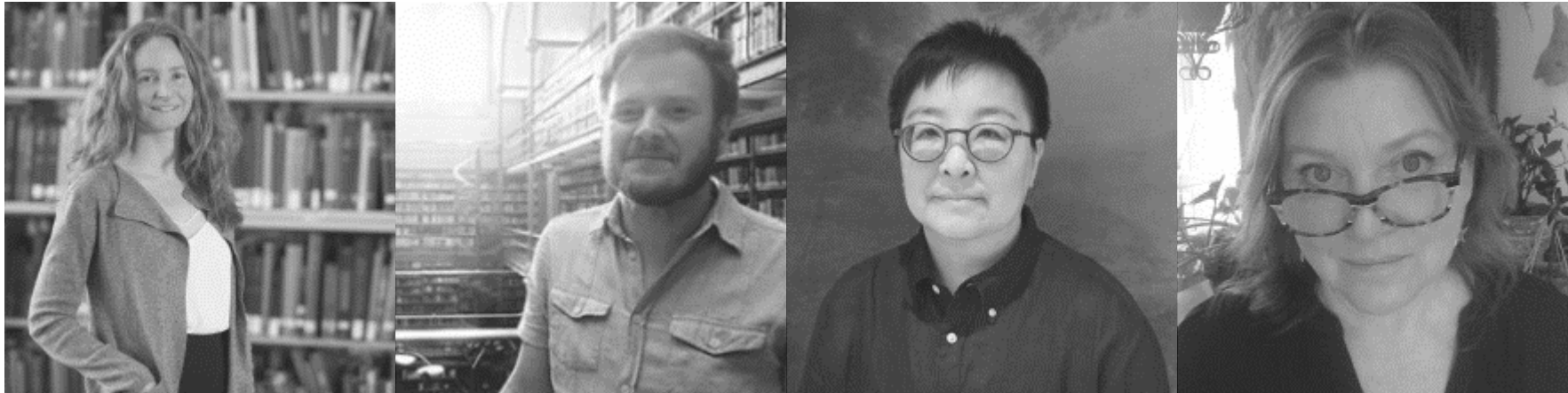


*Not pictured: Dana McFarland (Vice-chair), Johanna Smith,
Mark Jordan*

Preservation and Access Committee

Member	Role	Institution	Band
Ken Hernden	Chair	Queen's University	10
Dana McFarland	Vice-Chair	Vancouver Island University	6
Creighton Barrett	Member	Dalhousie University	10
Catherine Cole	Member	Catherine C. Cole & Associates	-
Sharon Farnel	Member	University of Alberta	12
Émilie Fortin	Member	Université Laval	11
Mark Jordan	Member	Simon Fraser University	10
Ian Milligan	Member	University of Waterloo	11
Eric Schwab	Member	Toronto Public Library	-
Johanna Smith	Member	Library and Archives Canada	-
Cassandra Tavukciyan	Member	Canadian Museum of History	-

Canadiana Content Sub-Committee



*Not pictured: Dana McFarland (Chair), Victoria Dickenson, Alison Harding-Hlady,
Rosa Pinto, Jonathan Scotland*

Canadiana Content Sub-Committee

Member	Role	Institution	Band
Dana McFarland	Chair	Vancouver Island University	6
Heather Dean	Member	University of Victoria	10
Victoria Dickenson	Member	McGill University	12
Alison Harding-Hlady	Member	Library and Archives Canada	-
Dan Mirau	Member	Concordia University of Edmonton	3
Susanna Ng	Member	Chinatown Storytelling Centre	-
Rosa Pinto	Member	Toronto Public Library	-
Julia Roberts	Member	University of Waterloo	11
Jonathan Scotland	Member	Dictionary of Canadian Biography (University of Toronto)	13

Platform Technical Sub-Committee



Not pictured: Mark Jordan (Chair), Donald Moses, Roslynn Ross, Daniel Sifton

Platform Technical Sub-Committee

Member	Role	Institution	Band
Mark Jordan	Chair	Simon Fraser University	10
Stephen Marks	Member	University of Toronto	13
Donald Moses	Member	University of Prince Edward Island	6
Roslynn Ross	Member	Library and Archives Canada	-
Daniel Sifton	Member	Vancouver Island University	6
Brandon Weigel	Member	BC Electronic Library	-
Bridget Whittle	Member	McMaster University	11
Lee Wilson	Member	Portage/ACENET	-

Canadiana Trustworthy Digital Repository Audit Group



*Not pictured: Mark Jordan (Vice-chair), Janet Bennett, Lisa
Goddard, Kenton Good, Beth Knazook, Sarah Lake, Tom
Smyth*

Canadiana Trustworthy Digital Repository Audit Group

Member	Role	Institution	Band
Marie Waltz	Chair	Center for Research Libraries	-
Mark Jordan	Vice-chair	Simon Fraser University	10
Janet Bennett	Member	Library of Parliament	-
Lisa Goddard	Member	University of Victoria	10
Kenton Good	Member	University of Alberta	12
Grant Hurley	Member	University of Toronto	13
Beth Knazook	Member	Digital Repository of Ireland	-
Sarah Lake	Member	Concordia University	10
Pascale Montmartin	Member	Bibliothèque et Archives nationales du Québec	-
Tom Smyth	Member	Library and Archives Canada	-

Canadiana Collections: Content

Canadiana

Digitized monographs, serials, government publications, and maps

Héritage

Digitized microfilm of archival primary-source materials from Library and Archives Canada



Canadiana



Metadata Initiatives and Priorities

Decolonizing Metadata Records

- Phase I of decolonization project complete, replacing the subject heading “Indians of North America” with “Indigenous peoples.”
- Work undertaken in consultation

Rights Statement Pilot Project

- Updated Terms of Service for Canadiana
- Development of controlled rights statements vocabulary

Enhanced Discoverability

- Discovery Systems
 - MARC Records & KBART files
 - EBSCO, OCLC, Ex Libris
- Catalogue materials for Canadiana Collections



Canadiana Platform: Preservation

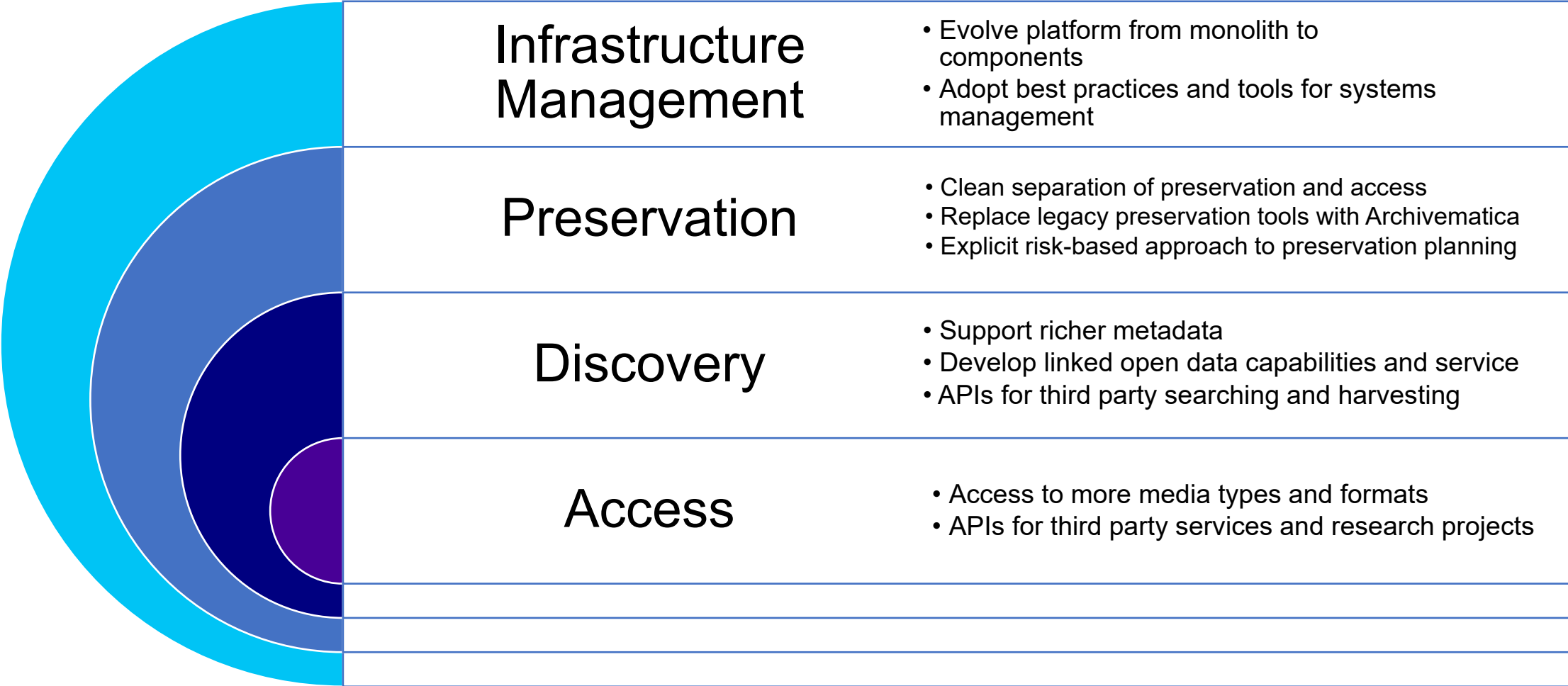
Preservation and Access

- Trustworthy Digital Repository (TDR)
- Access platform averaging over 100,000 page views per month
- Ongoing development work



Canadiana

Development Roadmap 2022-2023



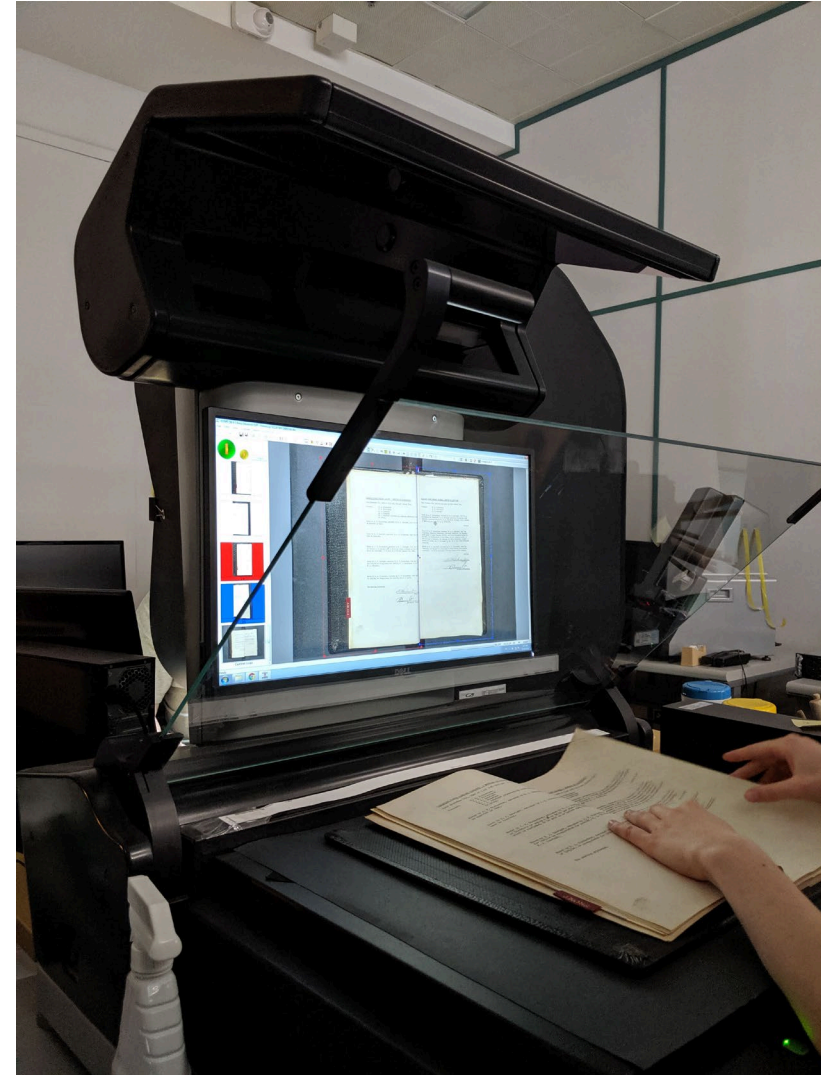
Digitization Services

Digitization

- Canadiana Collections
- CRKN Member Content
- Third-Party Collections



Canadiana



Digital Heritage Collaborations

{ BnF



McGill



NIKLA-ANCLA



uOttawa



University
of Regina



UNIVERSITY OF
TORONTO
SCARBOROUGH

Digital Heritage Collaborations

McGill University Library Maps Project

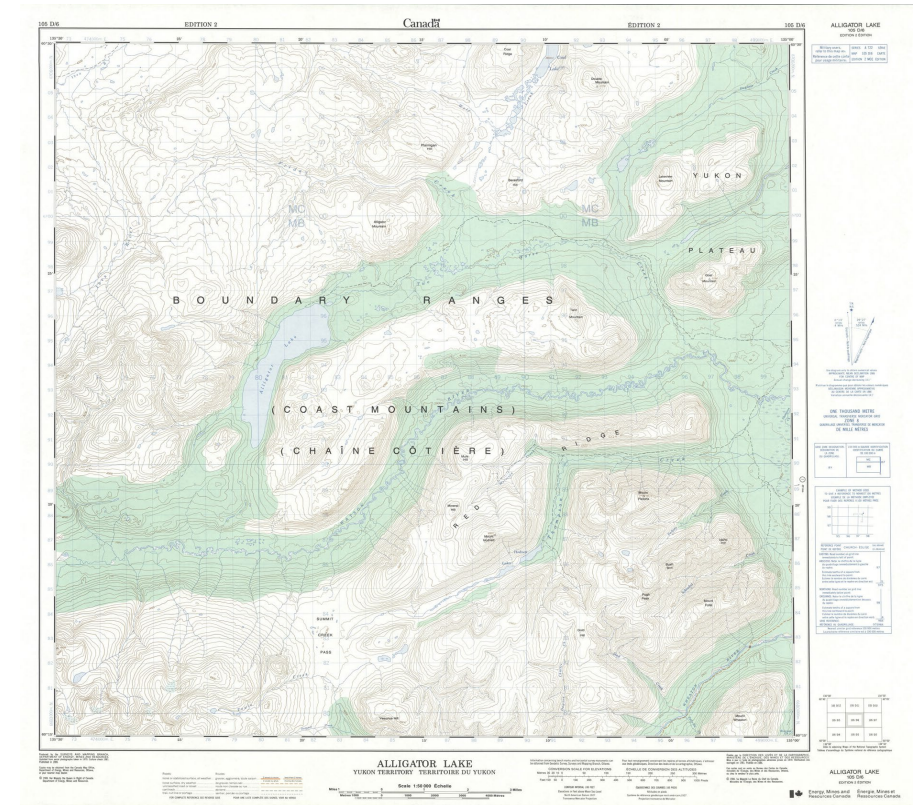
1:50,000 scale National Topographic Series

Added approx. 22,000 maps digitized by McGill University to the Canadiana collection

Content

Maps from 1905 to 2012:

- ground relief & forest cover
- administrative areas
- populated areas
- transportation routes and facilities
- other human-made features (buildings, power lines, dams)



(NTS) of Canada : Alligator Lake, Yukon Territory, Territoire du Yukon

Our Digital Heritage Community

CRKN Digital Heritage Listserv

Facilitate discussions on topics related to digitization and digital heritage initiatives in Canada.



Collection Reference Guides

Easily accessible guides to some of the most popular collections within H ritage.



What's New in Canadiana

Public, up-to-date list of *Coming Soon* and *Recently Added* content in the Canadiana and H ritage collections



The left side of the slide features a vertical decorative border consisting of several parallel white lines. These lines are interspersed with small white circles and elongated, pill-shaped white outlines, creating a modern, geometric pattern.

Community Collaborations

National Heritage Digitization Strategy

What is the NHDS?

Cross-sectoral coalition of memory organizations committed to expanding digital access to Canada's heritage.

Governance

- Executive Committee
- Advisory Committee
- CRKN Secretariat

NHDS Update Session:

- ***The Coalition for Canadian Digital Heritage:
The National Heritage Digitization Strategy
Reimagined***
 - October 6th, 11:45 – 12:30 pm ET

Engage with us!

- Email: secretariat@nhds.ca
- (EN) www.nhds.ca
(FR) www.sn timer pd.ca

Persistent Identifiers (PIDs)



ORCID Canada Consortium
Canadian consortium for ORCID



DataCite Canada Consortium
Collective of organizations and institutions minting DOIs in Canada through DataCite

Engage with us!

- orcid@crkn.ca
- datacite@crkn.ca

CPIDAC

- *Canadian Persistent Identifier Advisory Committee (CPIDAC)*
- Advising both consortia
- Canadian PID Strategy Development and Implementation
- Funding support by the Digital Research Alliance of Canada



Digital Research Alliance of Canada

Alliance de recherche numérique du Canada

ORCID Canada Consortium



What is ORCID?

- Global not-for-profit
- *A Persistent Identifier for People!*
- Helps scholars disambiguate themselves via ORCID iDs

What is ORCID-CA?

- Supports Canadian institutions:
 - integrating ORCID into their systems
 - promoting use of ORCID by scholars
- Five years old in May 2022!

Metrics

- 43 members, 9 provinces
- 46 member integrations
- 175,000 ORCID iDs (.ca)
- 14.5M ORCID iDs (global)



Governance

- ORCID-CA Governing Committee (OCGC)
- Canadian Persistent Identifier Advisory Committee (CPIDAC)

DataCite Canada Consortium



What is DataCite?

- Digital object identifier (DOI) registration agency
- *DOIs are a PID for things!*
 - Mint DOIs for scholarly content

Governance

- DataCite Canada Consortium Governing Committee (DCCGC)
- Canadian Persistent Identifier Advisory Committee (CPIDAC)



DataCite Canada Consortium

- Ensures **sustainable support** for Canadian institutions
- When **integrated** as part of their infrastructure, can **mint DOIs**.

Metrics

- 58 members
- 68 repositories
- 36,399 DOIs (Jan-Sep 2022)
- 39,404 DOIs (2021)

Canadian PID Strategy

What is PID?

- A PID is a long-lasting unique digital code that points to a *person, place, or thing* in research
- PIDs help disambiguate *entities*

Phase I

- CRKN, Alliance, CPIDAC
- MoreBrains Report
- Recommendations



Why a national strategy?

- Community-driven approach
- Collaborative work across sectors
- National funding to support centralized initiatives

Next steps

- List of challenges for research
- Assess which PIDs can resolve which challenges
- Models of PID-optimization
- Evidence of RoI

Finance and Administration

Finance and Audit Committee



Finance and Audit Committee

Members	Role	Institution	Band
Denis Cossette	Chair	Concordia University	10
Dale Amerud	Member-at-Large	University of Saskatchewan	10
Martin Bernier	Member-at-Large	University of Ottawa	11
Bernard Bizimana	Board Member	HEC Montréal	7
Andrew Coward	Member-at-Large	University of Victoria	10
Kemi Kufuor-Boakye	Member-at-Large	University of Alberta	12

Finance Overview

CRKN manages \$126M in content licensing on cost-recovery basis (>95% USD)

Budget Strategy

- Structurally balanced budget
- Budget developed within context of multi-year financial projections
- Restricted and unrestricted reserves provide stability and planning flexibility

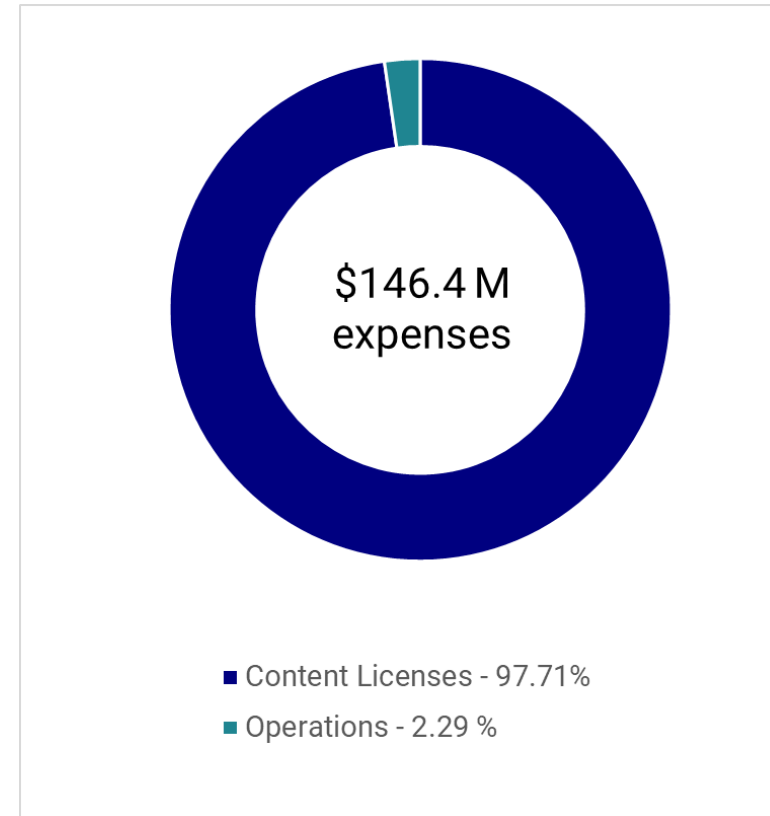
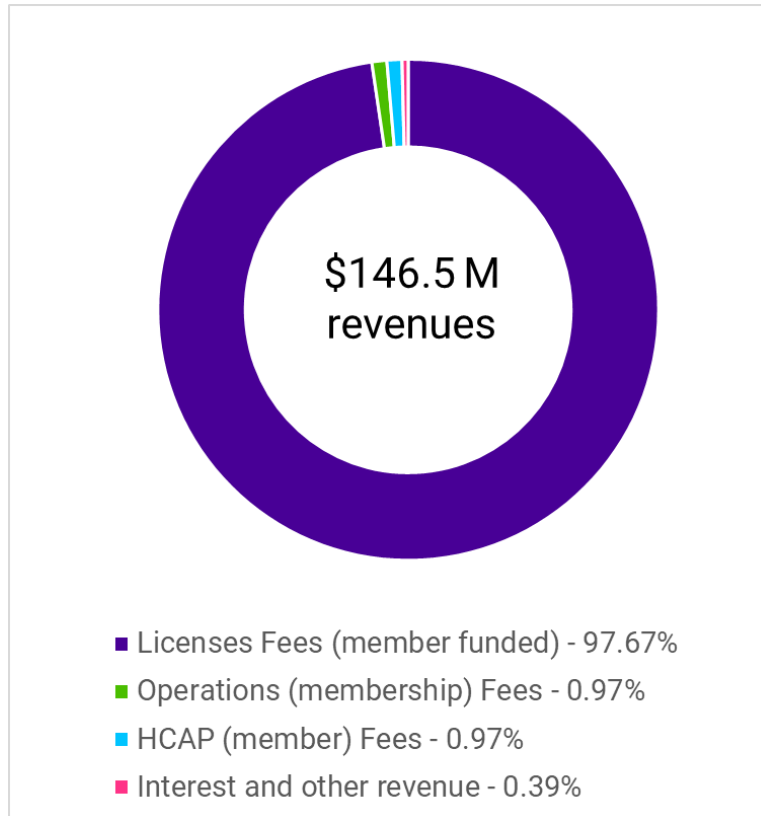
Key Financial Policies

- Net Assets Policy
- Budget Monitoring & Modification Policy
- Information Systems & Security Policy
- Travel Expense Policy

Oversight and Audit

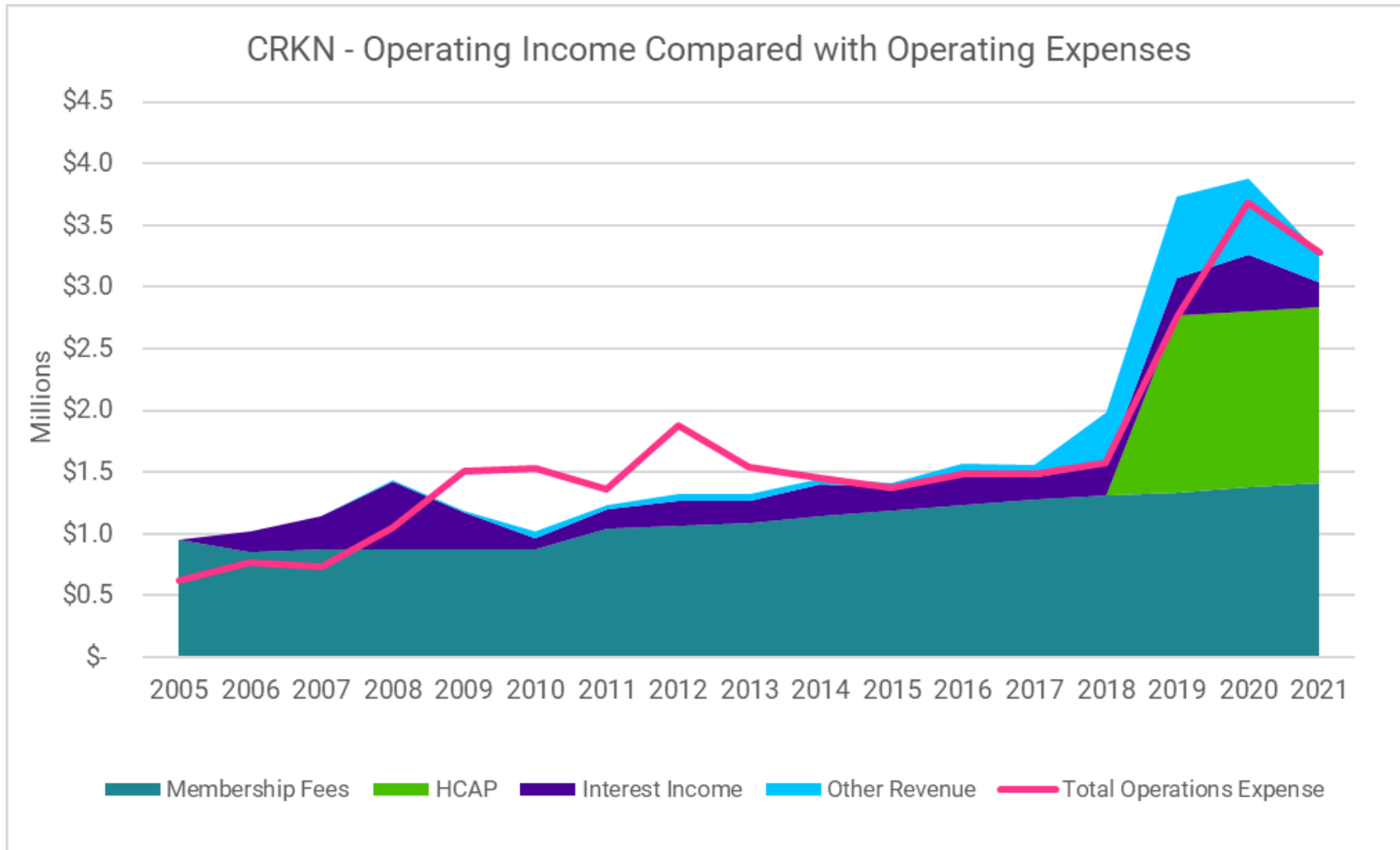
- Finance and Audit Committee
- External Auditor: *Deloitte & Touche LLP*

Financial Management

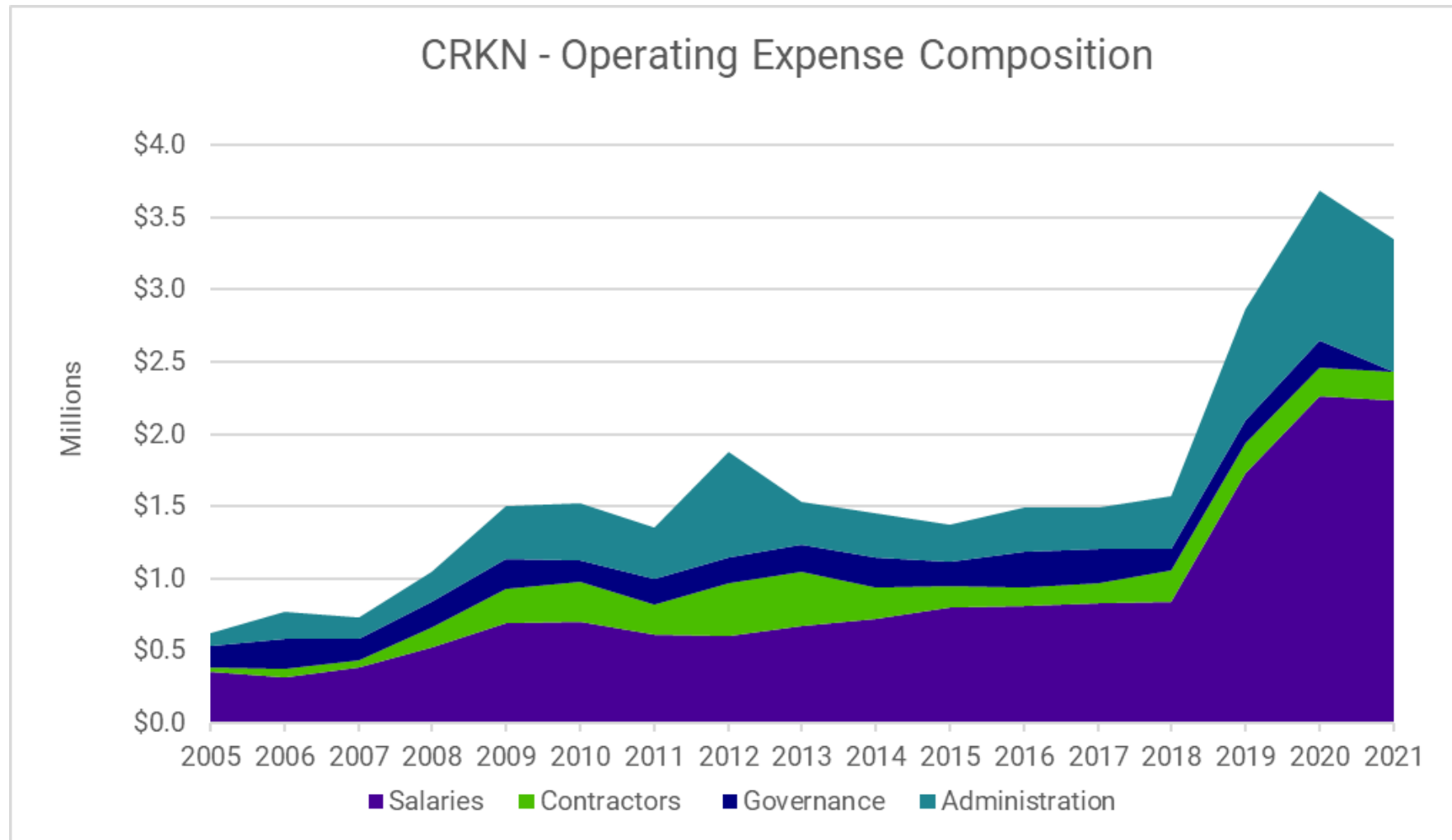


2020-2021 figures – reference only

Sources of Operating Revenue

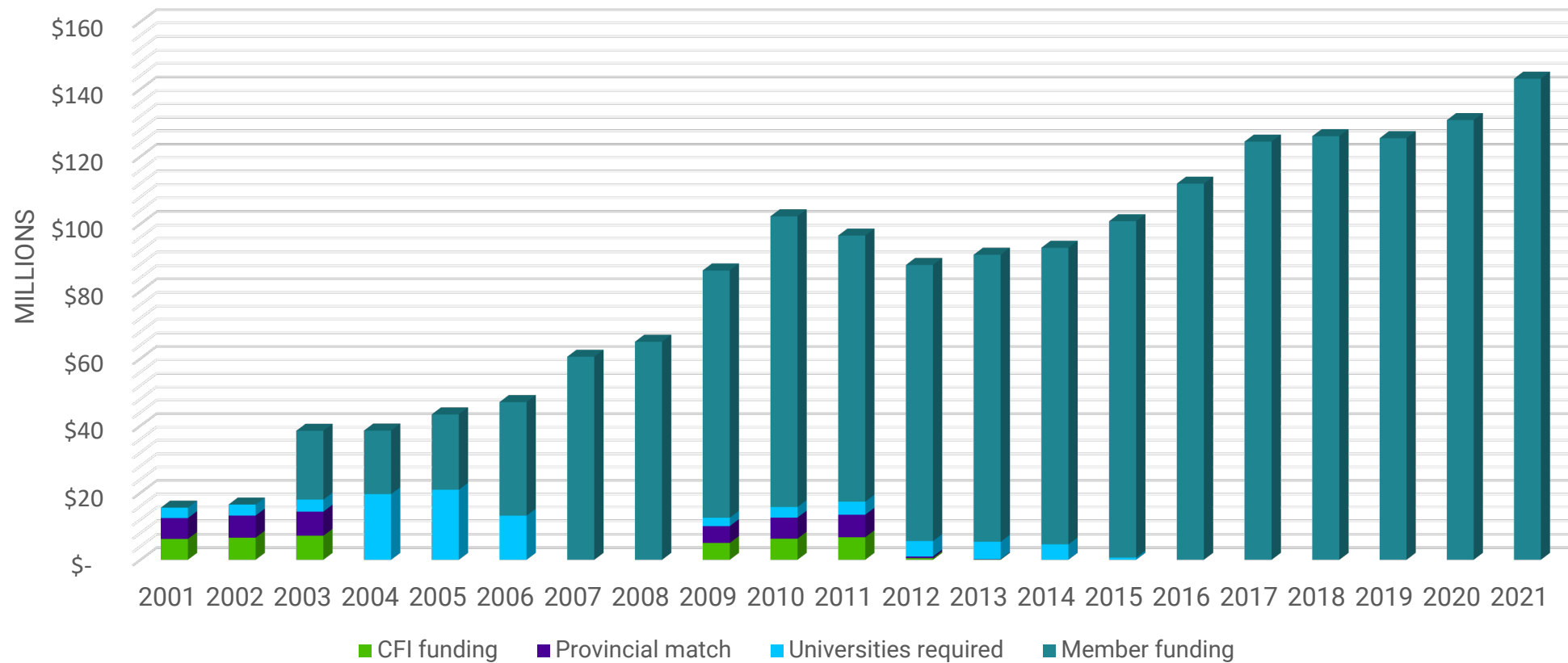


Operating Expenses



Highlighting CRKN's Relationship with CFI

CFI seed money leverages sustained investment



Engage with CRKN

If you're a member:

- We communicate directly with our members through:
 - Directors Listserv
 - Collections Listserv

If you're a stakeholder or member of the public:

- Questions: info@crkn.ca
- News: crkn.ca/news
- Digital Heritage Content and Preservation Listserv: crkn.ca/crkn-heritage-listserv
- Find CRKN through social media on:





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Questions
