

## About the CERL Strategic Plan 2024-2027

CERL's Strategic Plan, 2024-27 opens with an introduction to the consortium. Who are we? What do we do, and why do we do it? It outlines our priorities for the coming years around three core pillars: CERL as a professional network, as a network of data, and as a membership organisation. It provides a summary of the actions to be undertaken during the period of the Strategic Plan and describes the Key Performance Indicators (KPIs) associated with each of our three core functions.

This Strategic Plan was formally approved by the Board of Directors and ratified by the Members of CERL at their meetings in Rome in October 2024.

## INTRODUCTION

### *About CERL*

The Consortium of European Research Libraries (CERL), founded in 1992, is an international membership organisation. It engages in promoting, sharing and developing the written heritage of Europe – books and manuscripts produced before the middle of the 19th century – represented by the collections of our members and beyond. CERL aggregates and maintains library and research data that is trustworthy, reliable, accessible and standardised, to make it available for use in new ways and contexts. Academics and researchers thus gain access to Europe's cultural heritage in rich and diverse bibliographic contexts, including digital collections, thesauri, provenance information, and descriptions of the materiality of items. Joined together in the CERL environment and beyond, the distributed European heritage collections and the rich and different resources of

our members contribute to documenting an interconnected cultural space, which thus gains greater visibility and emphasis.

In CERL, library and information professionals work together with a focus on support of historic written cultural heritage. *Leaders of our member institutions* have access to a pool of shared expertise for the development of strategy, policy and tools for their implementation in this specific international field. CERL brings together a trusted and supportive community of *specialists*, dedicated to professional curation of and public engagement with the written heritage of Europe up to the middle of the 19<sup>th</sup> century. CERL offers a platform where best practices are shared, and sensitive issues may be explored confidentially. Since 1999, CERL has been supported by the Data Conversion Group, Göttingen (DCG). With their input and underpinned by their technical expertise, CERL has been able to develop a portfolio of specialised digital services strategically chosen to meet the expectations and needs of our members and their specialist users. *Researchers* know that via CERL they can access reliable and trustworthy data and connect with specialists in various book history areas.

### *Position of CERL today*

Our strategy for the coming years builds on strong foundations and firmly established structures. In a time of major geopolitical, environmental, societal and technology changes, CERL forms a community that is physically dispersed and culturally diverse, yet united in its goals. Together, the community shares a long-term perspective on the stewardship and curation of written European cultural heritage up to the middle of the nineteenth century and we promote engagement with it. The organisation aims to be efficient, sustainable and innovative in the world of libraries and research.

CERL offers a firm, reliable and efficient organisational structure for its members, a focussed, respectful and trusting consortial cooperation in clearly defined areas of continuous or actual interest through active, dedicated working groups, strong communication and information, well-established and strong relationships with other national and international organisations. CERL works with reliable and future-oriented technological partners to streamline its data competencies and activities to make them rich, demand oriented, useful and well integrated in today's research and library infrastructures.

## **STRATEGIC DEVELOPMENTS**

CERL is both a professional network and a network of data – acting in a symbiotic relationship where the one is enhanced by the other. In the coming years we must strengthen both so that CERL as an organisation remains responsive to the changes and challenges that members of our professions will face.

### **CERL as a Professional Network**

#### *Membership as a key issue*

As a membership organisation CERL fully depends on the continuous cooperation and investment of the members. Their active participation at an organisational level (Board of Directors, Executive Committee) and participation at all levels of activities (Annual General Meeting, working groups, conferences, advocacy, communication, data supply, editorial support) is vital for CERL's success. Access to membership and our support of members must be transparent, efficient and convincing.

#### *Organisational relationships*

CERL keeps itself and its members informed about national and regional initiatives and liaises with other (inter)national organisations – including archival institutions and museums. We seek to work with them whenever their work and agenda complement those of CERL. This cooperation will be harnessed in organising events and sharing expertise to best integrate CERL and its members in the wider community. The role of CERL as a communication hub or co-organiser and any financial commitment associated with that must be clearly defined according to parameters set by the Board of Directors.

#### *Community building - Benefits of CERL for professional leaders, specialists, sensitive and up to date issues*

Through CERL, members engage in European-heritage-focussed regional, national and international collaboration to increase efficiency, visibility and services for their users. The CERL network brings together skills, experience and expertise of staff and senior leaders from member institutions. It enables *senior leaders* to draw on the insights and experiences of their peers internationally in the formation of strategy and policy. CERL offers a trusted and supportive community where sensitive issues, including cultural property topics such as the return of spoliated items, thefts, due diligence, equity, diversity and inclusivity and preparedness, may be explored confidentially.

Providing access to its networks of experts in specialist fields, CERL can assist in training of *specialist staff*. The CERL network enables staff of member institutions to develop experience with strategic planning, and to maintain and advance awareness of current developments, opportunities, and issues, relating to digital as well as to material expertise.

CERL can assist members with succession management and capability building in disciplines where small staff numbers in individual member institutions can make this a challenge. CERL brings together existing resources and establishes connections with other organisations who operate in this field.

#### *Working groups*

CERL has an active Executive Committee which meets twice a year and several active Working Groups, reflecting the large number of disciplines involved in curating the collections at the CERL member libraries. CERL will work with the Chairs of these Working Groups to help organise their work and maximum visibility and wider applicability of their work in the CERL community. A particular emphasis will be on the inclusion of younger professionals. This focus is supported by the successful grants scheme which creates a cohort of younger professionals engaged with CERL. The diversity of the offerings is ensured by inviting propositions from all Members.

The agenda of the Working Groups is reviewed regularly and adjusted to current and emerging issues of concern to CERL members. The Security Working Group is a key international network around collection security, which also has

environmental awareness on its agenda to examine how collection security is impacted by floods, pests, other effects of climate change, but also explores how libraries may reduce their own negative impacts on the climate.

Within the working groups CERL acknowledges the considerable overlap between the curation of early printed books and manuscripts. CERL promotes and fosters the integration of this written heritage in CERL activities and data structures. The Manuscripts Experts Working Group reaches beyond CERL membership, when this is beneficial to its work.

The Cultural Property Working Group supports institutional leaders to deal with rapidly evolving national and international legislation around trade, import, export, acquisition and ownership of cultural property. This is also the Working Group where members engage with the need for policies and processes that ensure equality, diversity and inclusion.

#### *Third Party Funding – Heritage Projects*

External funding for programmes and projects is often sought by members to further develop their collections and their visibility. This is a competitive environment in which CERL is a known, specialist European partner for sharing data, establishing data links, promotional channels and sustainable curation of data after the project, where appropriate.

CERL will foster its relationships with research or library driven projects in digital humanities and will also continuously review and streamline its own data and services. CERL has policies and processes in place to ensure that the range of possible services that it offers is clearly defined, legally sound and sustainable. These policies and processes must meet the requirements of the project partners and funders and should allow for cooperation. CERL wishes to interact with national research structures and to integrate its offering in the emerging and evolving international digital humanities ecosystems.

This is a key issue for the Board of Directors, supported and inspired by the Digital Humanities working group.



## **CERL as a Network of Data**

The *CERL data network* with its different components will be strongly and carefully supervised through the CERL organisational structures to continue to provide meaningful, easily usable, specialized and quality-controlled data for research and authoritative data for the heritage-oriented library ecosystem and infrastructures.

CERL continues to aggregate and create digital resources in a structured framework within which member institutions can deliver digital services, jointly or separately, which they may not be able to deliver or sustain themselves.

CERL's long term core resources are The Heritage of the Printed Book Database (HPB) and the CERL Thesaurus (CT). Addressing research issues on a European level, the Material Evidence in Incunabula (MEI), the CERL Provenance Digital Archive (PDA), and a shared environment for annotating HPB records (called HPB Provenance) have been created and are maintained. CERL actively works to continually expand and enhance the content of these databases and encourages the research and library communities to use these services.

CERL has integrated the Incunabula Short Title Catalogue (ISTC) (for the British Library) and the Short Title Catalogue Netherlands (STNC) (for the Koninklijke Bibliotheek, the National Library of the Netherlands) in AMPLE, expressing its commitment to hosting bibliographic databases for European cultural heritage of international importance. AMPLE is the Abstract Metadata Publishing Environment developed for CERL by the Data Conversion Group, Göttingen. The ISTC and STCN are closely connected to the remits of Heritage of the Printed Book (HPB database) and the CERL Thesaurus (CT) and pave the way towards a linked open data CERL ecosystem. The integration of The English Short Title Catalogue (ESTC) into the AMPLE environment is a main strategic endeavour.

As a provider of specialized tools for written heritage, CERL must continuously monitor the appropriateness and sustainability of its role in data management issues and in the emerging big data infrastructure.

For this it is necessary to keep under review the legal framework of hosting, the financial and organisational implications and to define criteria for CERL's involvement in hosting research generated data. The cooperation with other heritage-oriented research and library networks will be actively maintained and

developed to ensure that the usefulness of the specialised CERL data ecosystem is maximised.

As far as possible CERL aims to align its different datasets and also to extend the interlinking between the CT and HPB and the datasets held in AMPLE. In the CERL data ecosystem, an overlap of data already exists (e.g. ISTC and STCN as stand-alone databases are copied into the HPB database, the CT and the internal Thesauri). The reasons for the various approaches will be made more transparent.

The role of digital images in the various displays and hosting of CERL databases must be described and streamlined. For instance, CERL will develop a bulk upload facility for the Provenance Digital Archive and introduce image recognition tools to avoid duplication of provenance records.

CERL aims to ensure that end users can themselves use our data with minimal intervention in a transparent process. AMPLE offers numerous ways to download data in a variety of formats. This needs to be given greater prominence. CERL will work towards better use of linked open data to enhance the role of CERL products in the emerging linked open data contexts. CERL aims to implement LOD and a SPARQL Endpoint for datasets hosted in AMPLE.

CERL is monitoring issues around cyber security, the deployment of IIIF, FAIR principles and artificial intelligence, based on and supported by the joint experiences of its membership.

## **Foundation: CERL as an Organisation**

### *Finances – Membership fees*

CERL's financial position is sound. It depends on the membership fees, with supplemental income from hosting fees. CERL remains aware of the financial challenges of its members. By making best use of its resources, CERL enables the

membership community to develop via CERL's portfolio of shared services, and to participate in third party funded research and/or development projects. CERL ensures that its members know that its resources are spent transparently and responsibly. The annual financial plan is agreed upon in the membership meeting.

CERL offers a flexible membership structure and aims to work with libraries and library consortia to find a way that enables them to participate in CERL at a level that is manageable and fair. This is carefully designed to target new members and widen CERL's impact inside and beyond Europe and the USA. The level of CERL membership fees has been stable for the last fourteen years, while the package of services has significantly expanded. The Board of Directors will review the membership and the hosting fees.

### *Methods of cooperation*

Conscious of the carbon footprint of in-person meetings and maximising the positive experience of virtual meetings, CERL organises its work through a responsible and well-planned mixture of online and physical meetings. Wherever possible, conferences will be recorded and shared on-line to allow for a larger audience. Attention will be given to the best ways to reach interested partners and to foster communication and exchange.

### *Visibility and communication*

In order to maintain the role of CERL as a hub for professional expertise and knowledge, CERL will create a new website, employing inclusive web design, aiming to update and create a rich and effective resource for the CERL community and beyond, with relevant and reliable information.

The communication policy of CERL is implemented by members of the Secretariat and supported by the work in the Engagement and Promotion Working Group. The CERL Newsletter, CERL Blog post and messages on social media, will be supplemented with a revived programme in the form of 'CERL Papers' series, both printed and online (open access).

<b>CERL as a professional network</b>	<b>KPIs</b>	<b>CERL network of data</b>	<b>KPIs</b>	<b>CERL as an organisation</b>	<b>KPIs</b>
<p>Focus on expanding the role of CERL as a hub for professional expertise and knowledge exchange through a programme of events on topical themes</p>	<p>Organise at least 3 events per annum on topical themes (in person or via zoom, as appropriate)</p> <p>Introduce a regular programme of shorter zoom sessions, featuring one speaker (up to 6 per annum)</p> <p>Evaluate participants' views on their usefulness and impact</p>	<p>Offer specialized and quality-controlled data for research and authoritative data for the heritage-oriented library ecosystem and infrastructures,</p> <ul style="list-style-type: none"> <li>- By integrating new data and keeping existing data up-to-date</li> <li>- By monitoring the quality of the data and setting criteria for including data</li> <li>- By ensuring that end users can utilise our data with minimal intervention in a transparent process.</li> <li>- By working with CERL members to present even more data in context (beginning with the ESTC).</li> </ul>	<p>Have a regular programme of uploading new data to the HPB (up to 3 data sets per annum), as well as updating existing datasets (up to 3 per annum), and report on it annually</p> <p>Provide a data analysis document to HPB file providers and work with their data to align it with the existing HPB format</p> <p>Implement (and update existing) hosting agreements between CERL and file providers</p> <p>Revive the HPB working group (3-5 dedicated CERL members plus DCG) to draw up and support an HPB development programme</p> <p>ESTC in AMPLE by the end of 2025</p>	<p>Supporting the role of CERL as a hub for professional expertise,</p> <ul style="list-style-type: none"> <li>- By creating a new website, which brings together valuable resources created by members and other organisations.</li> <li>- By capturing and publishing outcomes from conferences and workshops (in a format appropriate for each particular event)</li> </ul>	<p>Launch new website in 2026</p> <p>Publish two Newsletters per year</p> <p>Publish one volume of CERL Papers every two years</p> <p>Publish an average of 1 blog post per month</p>

<p>Ensure that the CERL offering includes something that is important professionally and inspiring to members, addressing issues from a strategy and policy level to an implementation level, and welcoming staff from early career librarians to institutional leaders.</p>	<p>Encourage participation in CERL events.</p> <p>Monitor uptake</p> <ul style="list-style-type: none"> <li>– Per CERL library member</li> <li>– Per participant's position in the library</li> <li>– Per participant's age-range</li> </ul> <p>Take a note of their networks</p>	<p>Focus on including additional data that is of sufficient trans-institutional interest and/or offers potential for interlinking with datasets that are already at CERL</p>	<p>Draw up criteria for including datasets in AMPLE and publish these on the CERL website</p>	<p>Review our income and expenditure streams to ensure that our finances support the best possible delivery of our strategic aims</p>	<p>In 2025, the Board of Directors will undertake a review of the future of the CERL finances</p> <p>A financial report on previous year and budget forecast for the coming year is presented to the members annually at the AGM</p>
<p>Strengthen the Working Groups,</p> <ul style="list-style-type: none"> <li>- by rejuvenating the membership of the WGs</li> <li>- by maximising the visibility of their work,</li> <li>- by ensuring outcomes of their work align with the agendas and programmes of work at CERL member libraries.</li> </ul>	<p>At least five stable and active WGs in place, who will present their work at the AGM, and who will organise (online) meetings, presentations, or publish a blog post</p> <p>Review the memberships of the WGs at least bi-annually</p> <p>Review the remits of WGs and review whether CERL has all the WGs it needs at least bi-annually</p>	<p>Expand the programme of work to align and link data (both between data sets held at CERL and linking to external resources)</p>	<p>Build a programme for connecting data sets, both those held at CERL and external data sets (by 2025 and implement it in the following years).</p> <p>Formalise an organisational structure (incl. DCG, WGs and file providers) to monitor this</p> <p>Publish AMPLE data as LOD</p> <p>Prepare the creation of a SPARQL endpoint</p>	<p>Offer a trusted and supportive community where sensitive issues, including cultural property topics like the return of looted (spoliated) items, thefts, due diligence, equity, diversity and inclusivity and preparedness, may be explored confidentially.</p>	<p>Annual in-person event, at the proposal of CERL members</p> <p>Maintain the annual collection security summer school</p>
<p>Relate to national and regional initiatives and liaise with other (inter)national organisations – including</p>	<p>Co-organise at least 3 meetings or events with (inter)national organisations over the lifetime of the plan</p>	<p>Strengthen the role of digital images in the various CERL databases.</p>	<p>Expand the content of the PDA with a minimum of 20 end-users</p>	<p>Strengthen the legal foundation of our agreements (e.g. with data providers) by reviewing all agreements</p>	<p>Process has been initiated to be completed by 2025. Annual report at the AGM in 2025</p>

<p>museums and archival institutions – where their work and agenda complements that of CERL.</p>	<p>Invite members of the EC and the Board, as their country’s ambassadors, to present about national and regional activities at EC/Board meetings</p> <p>Where mutually beneficial, invite representatives from the museum and archival community to attend CERL events</p> <p>Liaise with IFLA and LIBER on a regular basis</p>		<p>Include I5cBOOKTRADE images in the PDA for a minimum of 25% of MEI records via bulk uploading and ensure linking to MEI</p> <p>Introduce image recognition tools in the PDA</p> <p>Review datasets at CERL to establish the potential for including images</p>	<p>and contracts and align them with Irish law</p>	
<p>Interact with Funding Bodies and national research structures</p>	<p>Liaise with CERL members who wish to host ERASMUS + students</p> <p>Liaise with Funding bodies to ensure that the CERL offering aligns with their aims</p>	<p>Take account of issues around cyber security, I1IF, FAIR principles and artificial intelligence.</p>	<p>Participate in and report on initiatives in this context (e.g. in CERL members libraries, Biblissima, etc.)</p> <p>The Security Working Group will review the BL report on lessons learned after the cyber attack and enrich the Quick Audit Tool with their findings</p>		