

## Patron-Driven Acquisitions and the Development of Research Collections: The Case of the Portuguese Canadian History Project

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**E**stablished in 1959, York University is Canada's third-largest university, with more than 55,000 students and 7,000 faculty and staff engaged in interdisciplinary research and teaching. York's libraries are visited by more than 3 million people each year to consult in excess of 2.6 million printed volumes and 300,000 electronic resources. Since the late 1960s, this material has included research collections acquired to support the university's mission of "the pursuit, preservation, and dissemination of knowledge," and to "cultivate the critical intellect."<sup>1</sup> Librarians initially pursued the traditional gems of special collections: illuminated medieval manuscripts and early imprints bought from antiquarian book dealers in Europe and North America. Growing interest in Canadian studies, the creation of Canada's first comprehensive Faculty of Fine Arts in 1968, and the consolidation of responsibility for archives and rare printed material into a single department in the 1980s redirected this focus. By 2000, the acquisition policy for private archives stressed the themes of "Canadian women, Canadian writers, the arts, social reform, and the multi-cultural imagination,"<sup>2</sup> while special collections maintained an emphasis on Canadian studies through the addition of rare imprints and pamphlets "made on consultation with the appropriate bibliographer"<sup>3</sup> that complemented the private archives.

### Changing Times

The demographic pressures of the postwar population boom that led to the creation of York University continue to play out in this millennium. The first generation of faculty hired to teach at York—those for whom the libraries' research collections were initially developed—have retired. Between 2003 and 2008, the university hired more than 530 new faculty members, a turnover of approximately 30 percent. Canadian studies have waned, while fields such as sexual diversity and environmental history demand greater attention. Both within and beyond the walls of the academy, an aging generation struggles to resolve the fate of their papers and libraries due to retirement; relocation to smaller, more manageable accommodations; financial planning; and serious illness or death. Many baby boomers and their families turn to academic libraries to secure their cultural legacy at a time of growing concern over the apparent disinterest of national institutions in preserving a comprehensive record of the country's past.<sup>4</sup> But what are archivists and librarians to do? At a time when the availability of potential donations far outstrips the resources available to preserve this material and make it accessible, how do libraries ensure a reasonable return on the investment of diminishing funds through collections use by the burgeoning ranks of new faculty and graduate students with new and sometimes unpredictable research interests?

Patron-driven acquisitions, or user-initiated collection development as it is also known, provide some useful answers. This response is by no means new. The case for documentation strategies put forward by Helen Samuels in response to similar pressures during the 1980s proposed the structured collaboration of the creators, administrators, and potential users of records to select material for archival retention that

would be representative of a particular region or theme.<sup>5</sup> While users would have active input into the decision-making process associated with collection development, so would archivists. Such was not the case with the Portuguese Canadian History Project/Projecto de História Luso-Canadiana.

## Research Need

This ambitious initiative was started in October 2008 by Gilberto Fernandes and Susana Miranda, two graduate students in the doctoral program of the Department of History at York University, who were later joined by Raphael Costa and Emanuel da Silva. Unable to find sufficient primary sources in public archives to sustain their research, they sought material in private hands among the Portuguese community in Toronto. One of their earliest contacts was Domingos Marques, a devoted collector of documents pertaining to the development of his community. Due to his impending move to a new home, Marques transferred the collection to the care of the graduate students after they volunteered to arrange for its donation to an archival repository. They worked with Marques to arrange the collection and to capture metadata about its content through taped interviews. The success of this relationship led to the formal establishment of the project to pursue two goals: the preservation of records created by individuals or organizations associated with the Portuguese community in Canada, and “the democratization and dissemination of historical knowledge” by exploring formats that take history beyond the monograph or journal article to make it more accessible for “ordinary” Canadians, particularly those of Portuguese descent, to reflect upon their individual and collective experiences.

## Responsive Collecting

The path toward the first goal of preserving records was begun by York’s Department of History. Professor Marcel Martel, graduate program director, arranged a meeting between Fernandes and the head of York University Libraries’ Clara Thomas Archives and Special Collections (CTASC) in May 2009. Two years earlier, the libraries had released *Open Doors, Open Minds*, its strategic plan for 2007 to 2011. The plan outlined intentions to acquire unique collections with enduring research value, to experiment with innovative collection activities responsive to the needs of graduate students, to respond to student diversity and curriculum of an increasingly international nature by acquiring non-English-language material, and to develop collaborations on and off campus.

The Marques collection and other personal archives assembled by the Portuguese Canadian History Project closely aligned with these priorities. Much of the material would be used by the graduate students in theses, presentations, and publications. By bringing these documents into the public realm rather than leaving them in private hands, the libraries ensured that the students’ work would support the rigor of scholarly criticism through open access to primary sources that were the foundation of their research. Many documents were in Portuguese and concerned events and personalities involved with the Portuguese community’s social, economic, and political affairs. The project’s team members, who are part of this community, were able to bridge divides of language and culture that would likely be impassible for CTASC’s archivists. As graduate students in history, they were trained to recognize the research value of documents, thereby creating confidence in their appraisal decisions. The material was transferred to CTASC in October 2009, and under the stewardship of Anna St. Onge, archivist for digital projects and

outreach, donation agreements were signed between York University and the original owners of the records, inventories prepared with input from Fernandes and Costa, and income tax receipts issued after assessment by an external appraiser hired by the libraries to determine the market value of the gifts-in-kind.<sup>6</sup>

## Streamlining Digital Activities

St.Onge also played a key role in ensuring that the project achieved its second goal of democratizing and disseminating historical knowledge. In March 2006, the libraries completed a Digitization Initiative Strategic Plan, which called for the use of scanning and web-based technologies to make unique Canadian research collections available to support research and teaching at York and around the globe. This objective became a component of *Open Doors, Open Minds*, and subsequent planning led by Andrea Kosavic, digital initiatives librarian, called upon the libraries to consider ways of engaging scholars to contribute to this process by assisting in the selection and description of documents for digitization. The libraries' willingness to digitize significant portions of these acquisitions in the context of these plans was a major factor in the project's decision to deposit the material with CTASC. The students discussed digitization with another organization eager to secure unique historical content, but the libraries offered open access through its online electronic document repository. This arrangement would allow researchers in Portugal to examine these images without paying a subscription fee.

The Department of History funded a graduate assistant position so that Costa could identify documents suitable for digitization and work on a virtual exhibit. St.Onge enlisted Kosavic and her digital initiatives assistants (undergraduate students hired on a part-time basis) to scan photographs and issues of *Comunidade*, a newspaper for the Portuguese working-class community in Toronto's west end, using the annual operating funds of the Bibliographic Services Department, while Costa added metadata and documented the historical context for the material. St.Onge then collaborated with library computing services' software programmers to forge an online exhibit built using Omeka into a delivery vehicle for images, text, and video recordings. This workflow demonstrated that digital projects cut across departmental lines, and that they benefit from a flexible organizational structure that encourages archivists, librarians, and technicians to collaborate on initiatives. Digital projects also require effective communication among the libraries' management team. While it is generally understood that "[d]igitization and digital curation are no longer specialized activities; they are a part of the life-cycle management of special collections,"<sup>7</sup> such endeavors must be brought into the mainstream of annual budgeting and departmental work plans if the libraries' objectives based on leveraging unique research collections are to be achieved.

## Reaching a Global Audience

The project's website was launched in October 2011, and—like the project as a whole—it is a success on several levels. Within 14 months of the site's release, there were more than 32,600 page views. The majority of the activity originated in Canada, but it also included a significant number of visitors from Portugal followed by the United States, the United Kingdom, and Italy. The statistics supported the graduate students' conviction that their work would appeal not only to scholars on both sides of the Atlantic

but also to Portuguese Canadians with an enduring interest in their heritage. The profile of the project has grown through conference presentations and activity on social media such as Facebook, and it has sparked emulation. Professor Sakis Gekas and graduate student Christopher Grafos of York's Department of History approached CTASC in June 2012 to develop a similar arrangement for the Greek Canadian History Project; its website came online in January 2013.<sup>8</sup> Meanwhile, the Portuguese Canadian History Project team continues to scout out privately held material "to preserve a larger and more representative sample of records reflecting the experiences of Portuguese immigrants and their descendants in Canada,"<sup>9</sup> but this time with CTASC's archivists much more involved in discussions with donors once the initial contact has been made.

## User Driven, Mission Aligned

York University Libraries' experience with user-initiated development of special collections has been very positive in the context of its strategic objectives. Involvement with the Portuguese Canadian History Project has engaged graduate students in ways that significantly enhanced their academic experience, has brought unique elements of Canadian heritage into the public sphere that would have otherwise remained undiscoverable, has given an enduring voice to a community that was not well represented in archival repositories, and has connected the libraries with a global community of researchers. Will there be a sustained return on this investment? Given that the project maintains momentum after almost five years and that York University will host the inaugural conference of the Lusophone Studies Association in October 2013,<sup>10</sup> it is likely that these physical and virtual collections will only increase in relevance. The timing of the project is also propitious in terms of planning on a larger scale. York University's Academic Plan for 2010-2015 and the provost's white paper outlining strategic directions for 2010-2020 call for enhanced research capacity through strategic collaborations with external partners at local, regional, national, and global levels to become a more engaged university while coping with reduced government funding.<sup>11</sup> As demonstrated by the Portuguese Canadian History Project, patron-driven acquisition of special collections offers an effective mechanism to place academic libraries in the mainstream of achieving the university's core mission of building, disseminating, and preserving knowledge through collaboration and the engagement of external communities.

## Endnotes

- 1 York University, "Mission Statement," accessed April 25, 2013, [http://www.yorku.ca/web/about\\_yorku/mission.html](http://www.yorku.ca/web/about_yorku/mission.html).
- 2 York University Libraries, "Archives Acquisitions Policy," last updated 2000, <http://www.library.yorku.ca/cms/subjectspecialists/archives/>.
- 3 York University Libraries, "Description of Collection and Academic Programmes Supported," last updated 2000, <http://www.library.yorku.ca/cms/subjectspecialists/specialcollections/>.

- 4 Joseph Hall, "Historical Letters Not Wanted at Library and Archives Canada, Critics Say," *Toronto Star*, March 10, 2013, [http://www.thestar.com/news/insight/2013/03/10/historical\\_letters\\_not\\_wanted\\_at\\_library\\_and\\_archives\\_canada\\_critics\\_say.html](http://www.thestar.com/news/insight/2013/03/10/historical_letters_not_wanted_at_library_and_archives_canada_critics_say.html). The Canadian Association of University Teachers (CAUT) is among the most vocal critics of this development. CAUT's campaign to champion the country's libraries, archives, and museums in the face of federal budget cuts, "Canada's Past Matters," can be found at <http://www.canadaspastmatters.ca/>, accessed April 25, 2013.
- 5 Helen Willa Samuels, "Who Controls the Past," *American Archivist* 49, no. 2 (Spring 1986): 115.
- 6 For an overview of the material acquired through the Portuguese Canadian History Project, see "Collections," [http://archives.library.yorku.ca/pchp/?page\\_id=43](http://archives.library.yorku.ca/pchp/?page_id=43), accessed April 25, 2013.
- 7 Lisa R. Carter, "Moving Special Collections forward in an Age of Discovery: Themes from the ARL-CNI Forum," *Research Library Issues*, no. 267 (Dec. 2009): 15, <http://publications.arl.org/rli267/16>.
- 8 Greek Canadian History Project, accessed April 25, 2013, <http://archives.library.yorku.ca/gchp/>.
- 9 Gilberto Fernandes, "PCHP to Curate Photographic Exhibit on 60th Anniversary of Portuguese Immigration to Canada," Portuguese Canadian History Project, Dec. 16, 2012, <http://archives.library.yorku.ca/pchp/?p=375>.
- 10 Lusophone Studies Association, accessed April 25, 2013, <http://lsa.apps01.yorku.ca/>.
- 11 Senate of York University, Academic Policy, Planning, and Research Committee, "University Academic Plan 2010–2015: Enhancing Academic Quality in a Globalized World," accessed April 25, 2013, 6–8, <http://www.yorku.ca/secretariat/senate/committees/apprc/documents/UAP2010-2015.pdf>; and York University, "Building a More Engaged University: Strategic Directions for York University 2010–2020," April 2010, 7–8, [http://vpap.info.yorku.ca/files/2012/09/White\\_Paper\\_Overview\\_April\\_15.pdf](http://vpap.info.yorku.ca/files/2012/09/White_Paper_Overview_April_15.pdf).

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