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# Building and Enhancing Global Connections through Sister Libraries

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# Building and Enhancing Global Connections through Sister Libraries

*Prepared by the American Library Association's Emerging Leaders, Class of 2017,  
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# Introduction: Research Questions & Methodology

For the project “Building and Enhancing Global Connections through Sister Libraries,” members of the American Library Association’s (ALA) International Relations Round Table (IRRT) tasked the 2017 Emerging Leaders (ELs) Group C members with the following goals:

1. Identify factors that lead to successful and sustainable international library partnerships;
2. Propose new approaches to improve the sustainability of Sister Libraries partnerships;
3. Provide updated information about Sister Libraries partnerships to Sister Libraries Committee and develop/update Sister Libraries materials, based on data collected.

To achieve these goals, EL participants: (1) performed an investigation of the literature related to domestic and international partnerships and Sister Libraries programs; (2) conducted an open-ended, emailed questionnaire that four current and past IRRT Sister Libraries program participants answered; and (3) conducted an online survey of librarians both familiar with and unaware of the IRRT Sister Libraries program to assess awareness of and interest in the program. The four librarians who corresponded with the EL group’s open-ended questionnaire represented a public library in North America and three libraries from three different countries in Africa. The online survey received 238 responses from people working in a variety of library environments. The online survey’s disclaimer stated that results from the survey will only be shared in an internal report to IRRT; thus, the survey results were removed from this public-facing report. However, the survey findings were supported by existing literature, and a review of this literature is included in the report.

The following report summarizes the findings from these investigations, and it serves as a springboard for the EL team’s included proposal of new approaches to improve the sustainability of the Sister Libraries program, with specific attention paid to ways to improve how Sister Libraries partnerships are formed; marketing and outreach approaches to communicate Sister Libraries opportunities; and resources needed to ensure the sustainability of Sister Libraries relationships. This report also serves as a basis for the EL team’s specific recommendations that draw upon the data collected and analyzed.

## Sister Libraries: Background and History

The term “Sister Libraries” (hereafter, SL) describes the relationship of two libraries, usually from different countries, who have a formal or informal agreement to work together in some capacity. Such relationships can be executed in a multitude of ways, including sharing resources and employee exchange initiatives.

In 1999, then-ALA president Sarah Ann Long initiated a SL program through ALA’s International Relations Round Table (IRRT). Long’s vision for the IRRT SL program was that any library in the United States (U.S.) could establish a relationship with a library in another country (Lee & Bolt, 2016; Long, 2001). She also saw the program as one that would be open to libraries of all types (Long, 2001). Today, the IRRT Sister Libraries Committee helps promote and coordinate communication among U.S. and foreign libraries that are seeking such a relationship. The SL program works to “promote the concept of a global community of libraries,” while also providing opportunities to “raise awareness of issues and needs facing libraries in

various countries,” and to “learn more about a region or country represented by an immigrant group in [a library’s] community” (“Sister Libraries”, 2009, p. 3).

The practice of U.S. libraries partnering with international libraries predates, and is not limited to, the launch of the ALA SL initiative. For instance, Doyle and Scarry (1994) provide guidelines and examples of the concept of library “twinning”, which they define as “the ongoing relationship between two libraries in different countries for the purposes of improving the practice of librarianship across national boundaries” (p. 3). More recently, the International Federation of Library Associations and Institutions (IFLA) and the Medical Library Association (MLA) have developed programs that echo this concept.

## Partnership Types and Examples

Before examining the factors that lead to successful, sustainable international library partnerships, it is helpful to consider the varied forms these partnerships can take. The following descriptions are not an exhaustive list, but instead are shared to showcase the different types of relationships and activities that can fall under the umbrella of an international partnership. It is worth noting that much of the literature focused on academic libraries, which could be due to expectations of publication for tenure and promotion in a number of academic libraries.

### *Twinning*

A precursor to the ALA IRRT program (Lee & Bolt, 2016), the concept of “twinning” is described as a “primary principle” of the United Nations Educational, Scientific, and Cultural Organization (UNESCO) and spans beyond librarianship (Doyle & Scarry, 1994, p. 1). Examples of twinning projects involving libraries include: collection development activities, such as materials exchange and interlibrary loan programs; staff development opportunities, including intern exchanges and delegations visiting other libraries; donation/exchange programs; and public relations undertakings, such as adopting a library (Doyle & Scarry, 1994, p. 17-23). The authors also reference archives-specific activities, including exchanging microforms, developing shared finding aids, and organizing joint exhibits (1994, p. 25).

### *Organization-led programs*

International partnerships can be fostered through a statewide, regional, national, or international organization, and their areas of focus often tie to the organization’s mission or goals. The IFLA Sister Libraries program, for instance, was launched in 2009 in response to “challenges faced by many children’s librarians all over the world: insufficient training, professional isolation, inadequate book collections, lack of information on good books, and lack of moral support” (Rankin, 2013, p. 111). Today, the program continues as an offering of the IFLA Section of Libraries for Children and Young Adults. According to the IFLA section’s program website, new participants, who do not have to be IFLA members, can register via an online form, and individual partners can then determine which activities they would like to pursue, “according to the degree of involvement they want (it may just be communication/dialogue via email once a month!); also, according to what they can offer and according to what they need and the benefits they are seeking” (“What can sister libraries do?”, para. 1, 2016).

Like IFLA, the Medical Library Association (MLA) offers an international partnership program tied to its organizational goals. According to its website, the Librarians Without Borders program, sponsored by the Elsevier Foundation since 2007, “improves access to critically important health information in underserved countries through training in information retrieval and library information assistance” (Medical Library Association, 2017). Organization-led partnerships can also take place through a regional or statewide organization. For instance, the Colorado Association of Libraries’ International Library Cultural Exchange Interest Group (ILCE-IG) worked with the mayor of Denver and Sister Cities International to initiate communication with Denver’s sister cities (Lee & Bolt, 2016, p. 214).

Organization-led partnerships can also have multiple components. ALA’s partnership with Bibliothek und Information Deutschland (BID), for example, brought together 30 U.S. librarians and 4,000 librarians from Germany and other countries for a “Library Spaces: Real and Digital” event in Leipzig, Germany, during March 2016. Activities led by U.S. participants included a book exhibit and the sharing of graphics and resources, while German participants hosted a panel discussion and initiated a range of conversations that included bullying in the library, sustaining publishing services, the Association of College and Research Libraries *Framework for Information Literacy for Higher Education*, and serving immigrants. The partnership is planned to run through 2019 and to “help to strengthen links between the countries’ libraries by intensifying the exchange and knowledge-sharing and by fostering lasting relationships between institutions and individuals in both countries” (“ALA and Germany Unite”, 2016, p. 25). Upcoming events include a poster and webinar series at the ALA Annual Conference in June 2017, and a goal of increasing individual U.S. and German SL relationships by creating at least 25 new partnerships by 2019.

## *Institution-led programs*

Institution-led programs are typically set up by an individual college, university, or library and do not involve associations such as ALA or IFLA. There are many examples of this type of partnership, which can focus on a range of programs or a specific experience, such as supporting exchange programs or fostering interlibrary lending. A library’s involvement may grow from groundwork laid by the institution. For instance, Yale University began conversations with the University of Tokyo and Waseda University’s libraries to support study abroad experiences, and Yale’s East Asia Library contributed to these experiences through agreements and initiatives that included issuing library cards, obtaining extended access to Waseda’s library, and identifying ways in which the libraries’ environments were similar. Hammond (2009) notes that, “From the Yale perspective, these agreements helped extend library access services to Yale users abroad in order to address several issues and problems” (p. 94). Such initiatives, it seems, can build awareness not only from a partner library, but with an institution’s own students, staff, or faculty, who may not realize the reach of their library’s offerings.

The seven libraries in the Matariki Network of Universities (MNU), which include institutions in the U.S., Canada, England, Sweden, Germany, Australia, and New Zealand, provide a different type of example of an institution-led partnership. According to the Matariki Network’s website, MNU members’ mission is to “build upon the collective strengths of its member institutions to develop international excellence in research and education and to promote social responsibility locally and globally (“Our Mission,” n.d.). The libraries’ approach also provides an interesting example of program assessment through a benchmarking project that helped members develop a shared vocabulary, gain knowledge of local academic cycles,

and “understand the environmental factors of one another, which should help support easy adoption of each other’s tools and initiatives” (Hart & Amos, 2014, p. 60).

### *Additional partnerships*

Some partnerships focus on a specific state or region and involve or are spearheaded by libraries and institutions in that area. While these partnerships do not always represent international relationships, examining them provided valuable information about maintaining partnerships across multiple institutions. For instance, the Canada-based Librarians Without Borders (LWB, not-affiliated with the Medical Library Association program of the same name) began a partnership in 2011 with fellow non-profit organization Librii, which was founded in 2010 with roots at Rice University in Texas. LWB works to assist in Librii’s goal of building a Carnegie-inspired model of libraries, and it specifically focuses on Africa. LWB provides the Librii organization with staff expertise, a shared online portal, and a means of fostering conversations with librarians in target communities, helping Librii achieve its vision to “work with communities to build a network of low-cost, digitally powered libraries deployed along the expanding fiber-optic infrastructure in the developing work” (Heesen & Sellar, 2013, p. 35). Additionally, in the U.S., the Kentucky Public Library Association’s Sister Library Project (KSLP) pairs libraries within the state that have limited assets with those who have greater finances (Ritchie, 2012).

## Factors for Successful and Sustainable Partnerships

The literature review and responses to the EL group’s open-ended, emailed questionnaire and survey identified numerous factors that lead to successful and sustainable SL partnerships. In the questionnaire and survey, the EL group did not define the concept of *successful*, but instead allowed participants to define the term for themselves. The most frequently mentioned factors for a successful partnership were having a formal agreement, being in frequent communication with a SL, having face-to-face visits, having a flexible mindset, and planning a trial period.

### *Formal agreement*

Numerous articles recommend a formal agreement between partners. A formal agreement can be “a contract, a memorandum or letter of agreement, or a mutually agreed upon set of written objectives” (Doyle & Scarry, 1994, p. 3). Lee and Bolt (2016), in writing about SL partnerships, and Ritchie (2012), in writing about in-state partnerships, each recommend that agreements should include: the terms, goals, and objectives of the partnership; expected benefits of the partnership; some indication of activities; and primary and secondary contacts. Doyle and Scarry (1994) also note that participants should not promise anything that cannot be delivered. All details of the partnership do not need to be included in the formal agreement, especially if the progression of the program is unknown or uncharted. For instance, a written agreement between Yale University and Waseda University in Japan was not as specific as an agreement between Yale University and another Japanese university because the libraries wanted a more flexible structure (Hammond, 2009, p. 95).



Agreements can be made by the libraries at the local level, but if a library is part of a larger system, it might be necessary to involve other entities. For example, when Yale University Library partnered with two institutions in Tokyo, Japan, they had formalized agreements called Memorandums of Understanding (MOUs), which were part of a university-level agreements (Hammond, 2009, p. 94). The University of Tennessee, Knoxville Libraries undertook a similar approach in collaborating with Makerere University Libraries (MUL) in Uganda, even having the MUL University Librarian travel to Knoxville for final, in-person negotiations (Atkins, Smith & Dewey, 2005, p. 192). The authors note that, because the partnership involved the two universities, as well as the libraries, each institution's chief academic officer also signed the MOU, and this formal agreement became "an enduring symbol of the collaboration and provided momentum for the activities that followed" (2005, p. 192).

It is interesting to note that a past SL participant, who responded to the EL group's open-ended questionnaire, suggested "Binding Agreements with arbitration of Professional Bodies" as advice to give to those considering an international partnership, although this participant did not have formal or informal agreement in his or her own partnership. For those interested in formal agreement options, Doyle and Scarry (1994) provide a helpful prototype Memorandum of Agreement that illustrates this type of agreement (p. 35).

## *Frequent communication*

Communication is highly important in both creating and maintaining a partnership. Lee and Bolt (2016) call communication "the most important ingredient" (p. 219), while Sayed and Burnett (2014) note that, "Communication is essential to make the partnership work successfully and to form successful working relationships" (p. 353). Kidd and Roughton (1994) indicate that participants in a large-scale 1992 survey of librarians who participated in an international exchange and library directors in the U.S. and United Kingdom again emphasized the need for "communication, institutional support, and advance preparation" (p. 297).

Throughout the literature, the importance of communicating regularly and proactively continually emerged (Bolt, 2011; Hammond, 2009; Kidd & Roughton, 1994; Lee & Bolt, 2016; Sayed & Burnett, 2014). Bolt (2011) recommends getting into "the habit of communicating regularly, even if there is nothing really important to communicate about" (p. 5). Cornell University provides an example of this approach in its work with two branch libraries, including one in Qatar. The libraries hold weekly Skype sessions, in addition to sending numerous emails (Sayed & Burnett, 2014, p. 354). To facilitate this type of ongoing communication, Lee and Bolt (2016) recommend establishing a primary contact: someone who can commit time, is enthusiastic, and likes working with people from a different country. It is also important to make time to communicate with users, so that they understand the services the libraries provide (Hammond, 2009).

## *Face-to-face visits and virtual communication*

Related to the importance of frequent communication is face-to-face communication, or virtual alternatives such as Skype videoconferencing. Meeting in-person or in real-time with video can help promote understanding and friendship (Lee & Bolt, 2016). Ritchie (2012), in writing about the Kentucky Sister Library Project, notes that an initial get-to-know-you meeting among key participants can also be "a good time to come up with a list of needs that the underfunded library could use help with" (p. 40). Although he writes of an individual state's

in-state partnership, the same approach of familiarizing oneself with a partner's needs and environment can be valuable on an international scale.

Participants involved in Appalachian State University (ASU) and la Biblioteca Th'uruchapitas' relationship, for instance, traveled to each others' libraries. The exchange included both groups of ASU students traveling to la Biblioteca in Bolivia for research, service projects, and study abroad experiences, and librarian colleagues from la Biblioteca visiting ASU (Cramer & Boyd, 2010). The authors note that, "As more and more students seek out international service projects and study-abroad experiences to add to their resumes, la Biblioteca has proven to be a valuable partner to our university" (p. 3). In Illinois, the Des Plaines Public Library has bolstered its SL relationship with the Biblioteca Benjamin Franklin in Guadalajara, Mexico through week-long visits ("Sister Libraries", 2009, 3). Cornell University not only hosts regular Skype conversations and email exchanges; library staff from its New York campus have traveled to its partner in Doha, Qatar on several occasions, and vice versa (Sayed & Burnett, 2014, p. 354).

### *Flexible mindset*

A flexible mindset can pave the way for a partnership's continuation in the midst of unforeseen circumstances (Ritchie, 2012). This approach can also be valuable in initiating a partnership. Doyle and Scarry (1994) observe that, "Many of the existing twinning arrangements began informally and, in fact, owe their success to the flexibility and casual nature of the relationship. Imposing a more formal structure on these arrangements may prove counterproductive" (p. 9). Long (2001), in providing guidance for initiating partnerships, references a commentator at a 2000 IFLA conference program who encouraged broad expectations when searching for a new partnership. "Searches that are too specific, for example, such as a geological library interested in computer mapping seeking a similar library for exchange, probably will not result in success," the commentator wrote (Long, 2001, p. 82). A partnership between the University of Maryland and National Diet Library of Japan succinctly sums up the importance of flexibility. Sakaguchi, Shimada, and Wasserstrom (2009) note that, "In the end, however, it was a flexible library staff, willing and able to be retrained for the project, and a supportive library administration that made this project not only possible, but a success" (p. 26). One respondent to the EL group's open-ended questionnaire also echoed the importance of flexibility. The respondent indicated that his/her institution was interested in reviving a partnership but that "many things have changed since the last editing of our listing" as an SL participant.

### *Duration and trial period*

A trial period provides an opportunity to assess how a project is going, whether adjustments are needed, and if and how it should continue (Ritchie, 2012). Yale University's partnership with the University of Tokyo had a one-year trial period written into its MOUs, with plans afterwards to assess how the partnership went, both in terms of services offered to Yale patrons and those offered to University of Tokyo patrons (Hammond, 2009, p. 95). The Matariki Network's seven sister libraries, discussed previously, provide another example of setting aside a time during which participants assessed what they had done in order to move forward. Hart and Amos (2014) note that these libraries' benchmarking project provides a means to "set individual institutional performance in an international context and help identify areas of strength

and weakness” (p. 60). Doyle and Scarry (1994), again highlight the value of a timeline and trial period by writing that a partnership:

should exist, or be planned, for a minimum period of five years. The arrangement can, of course, be terminated before the initial five-year period, but it is probable that five years will be needed to assess the arrangement and its benefits to both partners. If either partner is uncomfortable with this time frame, a trial period arrangement of two to three years may prove more workable. (p. 3)

A trial period could present a low-stakes, short-term opportunity for those who are curious but somewhat on the fence about the SL program to learn more through firsthand experiences.

## *Mutual benefits*

Each individual set of partners will have its own set of benefits. Identifying and communicating these benefits can help a partnership find its identity and succeed. The advantages to each partner may not always be the same, but they should be mutually beneficial (Doyle & Scarry, 1994, p. 4-5). Partners should consider what they each can bring to the table. Long (2001) notes that,

Sometimes the libraries from developing countries feel that they have little to offer materially, but participants from countries with more material resources spoke passionately about the need for information on culture, language and history that any library could provide. Cultural exchange emerged as the most important benefit of a library-to-library relationship. (p. 82)

Benefits can be seen both in what they bring to an institution and what they can bring to individuals involved in the partnership. Kidd and Roughton (1994) found that, in a survey of American library directors, these individuals saw benefits in terms of image and international relationship-building, while their British and Irish counterparts focused on the value that partnerships brought to individual staff members and the library’s workings. Library staff members who participated in an international exchange and responded to this survey described improved motivation and enhanced work performance as a result of their experience (Kidd & Roughton, 1994, p. 297). Library directors surveyed echoed this theme by saying that an international exchange program could potentially re-motivate staff who had been in a role for some time (p. 298).

Individuals who participated in the EL group’s open-ended questionnaire also seemed to see value in the types of mutual benefits described above. Two individuals who corresponded through the EL group’s open-ended questionnaire indicated that the motivation for initiating a partnership was to share knowledge, while one also referenced an interest in the promotion of their own library’s work and the other indicated that a desire to “mobilize reading resources” served as the impetus for participation.

## *Additional factors in success*

While the aspects of successful partnerships discussed above are particularly important to consider when setting up a partnership, those referenced below build upon these aspects by highlighting attributes that can sustain a partnership.

- **Foster a feeling of equality.** This approach is particularly important when one library is less well-funded than the other. Having each library know that it contributes to a relationship, whether through tangible products, such as sharing electronic resources, or intangible offerings, such as sharing stories of working in a different culture, can help sustain both partners' commitment to the relationship. Writing a clear scope and determining what each party will contribute (Lee & Bolt, 2016), as well as putting an equal effort into communicating and fostering a strong, close relationship can enhance this feeling of equality (Kidd & Roughton, 1994).
- **Identify funding** and agree on a cost structure (Lee & Bolt, 2016; Sayed & Burnett, 2014).
- **Have supportive library administrators and institutional support,** including administrators who encourage their staff members to develop relationships with other libraries and administrators who regularly communicate with their SL themselves (Atkins, 2010; Lee & Bolt, 2016; Sayed & Burnett, 2014).
- **Involve multiple library staff** to ensure partnerships continue during staff turnover or changes in roles and responsibilities (Lee & Bolt, 2016). This is also important, as workload and limited time and resources are issues librarians face.
- **Establish a common language** to use when communicating (Lee & Bolt, 2016, p. 219).
- **Share frequent updates.** It is especially important to share updates with the libraries' governing bodies through reports, emails, newsletters, or the institution's preferred method of communication (Lee & Bolt, 2016).

## Factors that Weaken Partnerships

A number of factors can diminish Sister Libraries partnerships, including poor communication and lack of communication technologies, lack of time, local customs, lack of staff involvement and buy-in, little trust, and managing expectations.

As discussed in the preceding sections, communication is highly important in both building and sustaining partnerships; thus, it should not be a surprise that a lack of communication between parties is a factor in weak partnerships (Lee & Bolt, 2016). Rankin (2013), in writing about the IFLA Sister Libraries program, notes that "The pressure of time is often cited as the reason for lack of communication" ( p. 116). Additionally, time and workload are concerns for librarians, and that even those not currently in a SL relationship perceive that the impact of time could be a stumbling block in developing and sustaining a relationship. Kidd and Roughton (1994) indicate that respondents to their survey on librarian exchanges saw challenges in the time and resources involved in both setting up and monitoring an exchange, as well as completing paperwork and planning to arrange coverage at their library during a staff member's tenure at their partner's library (p. 298).

Local customs and politics is another factor to consider. For example, Doyle and Scarry (1994) wrote about public library services in Sub-Saharan Africa, a region that has a different culture than the U.S., in that it is largely oral and the cost of books is prohibitive. Local customs can also impede communications, as one society might be largely oral and some countries have different time zones and work weeks than the U.S. When Sayed and Burnett (2014) worked with Cornell's branch library in Qatar, they found both the time zone differences and Qatar's traditional work week of Sunday to Thursday to be barriers to scheduling conference calls or joint events, as well as causing a delay in emailing.

While technology can benefit international partnerships (for instance, by making it possible to videoconference if in-person visits are not feasible), in some instances it can be a factor that impedes partnerships. As Rankin (2013) observes, “It seems ironic that this is an issue in our twenty-first century world, the digital divide is a problem that the Sister Libraries godmothers have identified” (p. 116). One respondent to the EL group’s open-ended questionnaire reflected the challenge of technology and communications by noting that they had decided to stop communicating with their SL partner due to a concern that this partner’s email had been hacked. The respondent also noted that they believed the partnership had lagged due to a “communication breakdown due to lack of alternative channels to communicate.” In an era where hacking and “fake news” dominate headlines and different countries have different levels of access or restrictions to email and social media platforms, such considerations are important to keep in mind when designing and sustaining SL partnerships.

A lack of staff involvement and buy-in from stakeholders can also weaken partnerships. More than one library staff member needs to be involved to allow for multiple contacts in case someone leaves (Lee & Bolt, 2016). It is important to have reliable financial, institutional, and political support to sustain relationships. Weaving components of the partnership into the workings of the library will lead to a better chance of success (Atkins, 2010).

Additionally, trust takes time to build, and it may build slowly. One party may doubt the other partner’s interest and whether they are fully invested in the relationship (Lee & Bolt, 2016). Strong and frequent communication can help build trust, a sentiment echoed by a respondent to the EL group’s open-ended questionnaire, who gave the advice of “Effective communication and follow up by visiting the projects in order to appreciate the progress” in response to the question of what else they would like to share about the SL program and their participation.

The final factor that can diminish SL partnerships is not managing expectations. Bolt (2011) says, “Sometimes libraries in developing countries expect more than their Sister Library can deliver, such as equipment and significant print/electronic resources” (Bolt, 2011, Ten Tips for a Successful Sister Library Partnership section, number 5). Having a clear scope of the partnership (Lee & Bolt, 2016) and having a strategy in place to support a disappointed party (Rankin, 2012, p. 8) are methods to help manage expectations.

## Summary of Factors for Consideration

The literature review, open-ended questionnaire, and survey responses demonstrate that multiple factors are involved in fostering a successful and sustainable Sister Libraries partnership. A formal agreement can help determine the benefits and project scope, each party’s contributions, and a trial period or end date, as well as establishing and managing expectations, all of which are factors that contribute to a successful and sustainable SL partnership. It is also important to have strong, frequent communication, to use communication technologies or methods that are accessible to both institutions, and to involve multiple library employees in the partnership to ensure the relationship can weather turnover and change. A flexible mindset, or the expectation that not everything will go as planned and that the partnership will likely evolve over time, can also help relationships to succeed. Such a mindset can cultivate a sense of trust, so that both partners feel that they have the ability to discuss the relationship and identify ways to make it a rewarding experience for all involved.

# Proposal: Approaches to Improve Sister Libraries Partnerships

Drawing on the aforementioned factors identified as contributing to successful and sustainable partnerships, the Emerging Leaders (EL) group proposes the following recommendations to enhance Sister Libraries (SL) relationships. The approaches proposed incorporate learnings from the EL group's review of relevant literature, as well as responses to its open-ended questionnaire and online survey. These recommendations focus on improving the ways that SL partnerships are created; marketing and outreach approaches to communicate the SL program; and resources needed to ensure the ongoing sustainability of the initiative.

## *Suggested methods for pairing up libraries*

A review of current methods of pairing up libraries provides a reference point for proposing alternate methods of doing so. Based on a review of the literature, it appears that institutional and individual connections, professional and community-based networking, and word-of-mouth represent methods commonly involved in pairing libraries for international partnerships. Lee and Bolt (2016) note that many libraries have large immigrant communities, and having a SL from one of these communities could help its members forge connections with their home countries (p. 217). Individual outreach and in-person visits can also help foster relationships. For instance, a 1998 visit from Gabby Vallejo, founder of la Biblioteca Th'uruchapitas in Bolivia, to North Carolina's Appalachian State University, helped kindle conversations between the two schools (Cramer & Boyd, 2010). Beyond its staff and patrons, libraries may wish to look at other international programs that could serve as a springboard for conversations. For example, the U.S. State Department's American Corners program features U.S. resources and programs to connect people in the international communities within libraries across the world (Lee & Bolt, 2016, p. 218).

Professional development opportunities, such as library conferences, can provide another avenue for launching new partnerships or learning more about existing opportunities (Lee & Bolt, 2016). In addition to formal programs at these events, casual conversations and word-of-mouth may lead to the start of a relationship. In speaking about in-state partnerships among Kentucky libraries, for instance, Ritchie (2012) says, "Word of mouth has been key to the success of the project, with directors talking to one another at meetings, conferences, and other venues" (p. 41). While not speaking of SLs specifically, Atkins (2010) notes that library-to-library connections "may be created through informal networking, *ad hoc* projects, and even through outright serendipity" (p. 73). He references his own experience at the University of Tennessee, Knoxville's (UT) start to a relationship with Makerere University in Uganda. Makerere's librarians were doing some online networking to identify partners and learned of the UT Libraries' dean's "personal and professional interest in Africa," which led them to take a chance and unsolicitedly, contact UT about collaboration (Atkins, 2010, p. 73). Considering the needs and interests of one's own library as Makerere did, can be another starting point for partnerships. Doyle & Scarry (1994) give the example of a serials department encountering challenges in acquiring periodicals from other countries as one suggestion of a need that could lead to investigating partnerships.

## *Forms and formal agreement*

Forms stand as one way to formalize a partnership and make it easier to pair libraries. Doyle and Scarry (1994) provide a “Request for a Twinning Partner” form that requires a number of fields including: a primary contact person; collection information, such as monograph and serial titles; personnel, including number of professionals and support staff; special collections; financial support available; desired characteristics or activities of the twinning partner; and any language requirements for collection or personnel (Appendix 1, p. 33-34)

Research indicates that a formal yet flexible agreement between partnership libraries influences the success and sustainability of the relationship. The EL group recommends that IRRT develop a document that will help participating institutions formalize the expectations for a SL partnership. To this end, the ELs have developed a sample template for a formal agreement or Memorandum of Understanding (MOU) for IRRT to use and modify as appropriate. A template MOU can be found in Appendix A.

## *Communication*

Communication is one of the most important factors in a successful and sustainable SL relationship. The international, and often virtual, nature of the SL initiative means that communication can take many forms, and in order for relationships to be successful and sustainable, partner institutions will have to determine what forms of communication work best for their particular relationship. This is one of the reasons that a formal agreement or MOU is so important for each partnership. Such a document will help the libraries involved in the partnership to define the communication expectations that the institutions have of each other at the beginning of the partnership, and it will provide a starting point for conversations if communications challenges arise.

To assist in helping libraries define what the communication expectations for a SL relationship will be, the ELs recommend that IRRT pair sister libraries with similar communication needs and styles where possible. In order to achieve this pairing, IRRT should ask SL candidates about communication preferences, time zones, and staff availability to commit to the project when considering potential matches. Additionally, perhaps IRRT could provide a “Tips for Effective Communication” primer in a “Welcome to the Sister Libraries Program” information packet. This packet itself could be available in multiple languages and formats, such as a downloadable PDF, a printed version, and possibly a version that relies on audio, rather than text.

## *Face-to-face visits and virtual communication*

Among the defining characteristics of a successful international partnership is the potential for face-to-face visits or a suitable alternative through a virtual communication platform. Taking the time to identify the benefits and challenges of in-person visits when developing a SL partnership can help partners determine whether this type of activity is appropriate for their relationship, or if virtual “visits” are a more feasible approach.

In light of the challenges inherent in coordinating face-to-face visits between SLs, the EL group encourages IRRT to create a virtual space that would provide a means for libraries to network with each other beyond their specific partnership. This virtual space could be a

message board or listserv, where SLs could share and support each other across the world. Ideally this space could also be a place where IRRT SL materials would be available for partner libraries to reference or review at any time. The website of the MLA Librarians Without Borders program provides an example of having materials virtually available in this manner (Medical Library Association, 2017), as does the IFLA Libraries Program (International Association of Library Associations and Institutions, 2016). This particular virtual space would build on the existing IRRT SL wiki, but create a more robust and informative “gathering place” for the network of SLs. Providing a forum for SL participants to feel that they are part of a larger initiative and wider community could cultivate a sense of camaraderie, in which individual members chime in to share their successes, help troubleshoot problems, find common ground, or learn with or from one another. Such a forum may also help prevent a library from feeling that they are missing out if they are initially paired with a partner who seems unresponsive or finds that it can no longer participate. The “circle of partners” could then be a springboard for finding other partners, or simply continuing to be connected to the SL program.

## *Flexible mindset*

A flexible mindset about what a SL partnership should look like is also an important factor when considering what makes a partnership successful and sustainable. As the institutional needs and other circumstances surrounding the partnership change over time, a flexible mindset can help a successful partnership evolve rather than diminishing due to unexpected or unwanted changes.

Building on the idea of a flexible mindset, the EL group recommends that IRRT encourage institutions interested in creating a SL partnership to think broadly about potential partners and to look within their communities for potential partners before reaching out to IRRT to be matched with a sister library partner. Potential organizational partners include Sister Cities International. Furthermore, local chapters of Rotary International, Lions Club International, or Kiwanis International may have an existing relationship with a community interested in a SL partnership. Building on an existing relationship increases the chances that a partnership will be successful and sustainable. Moreover, respondents to the EL group’s open-ended questionnaire stated that their institutions were very interested in pursuing a SL partnership, but that their institution was never matched with an institutional partner. Therefore, SLs may be more successful and sustainable if an institution approaches IRRT with a community partner in mind, and IRRT could then support and mentor the partnership, while providing resources and expertise to help the relationship grow.

The EL group also recommends that IRRT reach out to non-governmental organizations and international development programs, as well as other service- or educationally-oriented organizations to determine if SL partnerships would be possible in areas where these organizations work. IRRT should explore the possibility of partnerships with organizations such as the Fulbright program (United States Department of State, n.d.b). Moreover, the Fulbright program is only one of the programs administered by the Bureau of Educational and Cultural Affairs, and it is likely that IRRT would find many other partnership opportunities that align with the work that this governmental office does (United States Department of State, n.d.b). Similarly the State Department-sponsored American Corner Program often works with Peace Corps volunteers to maintain and promote library services for host country nationals and, as such, could be another entity to consider in developing partnerships. Additionally, IRRT could look at



the Peace Corps' World Wise School program for inspiration on how to market the SL program to school libraries.

### *Duration, trial period, and mentorship*

The EL group's research indicates that the duration of a partnership also contributes to its success and sustainability, and that there is value in having a trial period to a new relationship.

The EL group recommends that IRRT set up a SL mentoring program to help monitor how partner institutions interact during the early stages of their relationship. The ELs believe that this is particularly important because an IRRT mentor would help foster the relationship in the early stages of the partnership, when risks of miscommunication of expectations are at their highest level. To that end, the IRRT mentor would perform activities such as facilitating introductions between the involved institutions, setting a communication schedule, helping the partner libraries to manage their expectations and goals while communicating the program norms, and generally serving as a contact person for each partnership on IRRT's behalf.

The ELs understand that developing a mentorship program specifically for the SL program could involve a large investment of time and resources; however, the group believes that the long-term value of such a program would outweigh short-term costs. Several respondents to the EL group's open-ended questionnaire indicated that they had expressed an interest in a SL partnership, but that they had never been paired with another institution. A mentorship program could help prevent this from happening. If a formal mentorship program does not seem feasible, IRRT could begin by establishing regular check points at which to monitor new partnership requests; for instance, three or six months after the initial contact. Using a platform such as Google forms, where timestamps could serve as a reminder of dates for these check-ins, may be an option to consider.

### *Funding sources*

The lack of funding and the reduced budgets that many libraries have recently faced is a deterrent to being able to participate in a SL partnership. Financial support from an endowment would be beneficial in creating sustainable partnerships. An aggregated list of potential funding from other non-governmental organizations, non-profits, and other organizations could be a useful resource. To help facilitate IRRT's conversations regarding funding, the EL group has included a list of potential grant sources for further research. This list is in Appendix B.

### *Marketing and outreach*

Based on the literature review and responses from the open-ended, emailed questionnaire and online survey, the ELs recommend the following approaches to market and promote the Sister Libraries program.

#### *Social media presence*

Social media outlets, such as Facebook and Twitter, are popular platforms for learning about ALA programs. The EL group recommends that the SL program create a presence on these two social media outlets. The EL group shared the survey on multiple Facebook groups

and other social media platforms to elicit responses; therefore the data may be favorably skewed towards this form of communication. Nevertheless, social media outlets, especially the two mentioned, connect librarians from around the world on their own time and at a low cost, usually free. The Facebook social interest group called the “Awesome Librarian Associated Think Tank,” or ALATT, which has no affiliations with the American Library Association is a resource that helps people that are not part of ALA or cannot attend ALA conferences keep up with official ALA programs. The social group currently has more than 27,000 members from all over the world and can be used as an invaluable resource to promote the SL program. Additionally, IFLA provides a good example of an active social media presence with its SL program. The group’s Facebook page (IFLA Libraries for Children and Young Adults Section, n.d.), for example, features announcements of new participants in multiple languages. Developing a social media marketing plan or calendar of content updates could be one specific mechanism to help facilitate an increased social media presence and provide continuity as new members get involved with IRRT.

While social media stands as an impactful way to market the Sister Libraries program to this desired audience, it also may be helpful to initiate further conversations with non-U.S. libraries to learn of their communication preferences and needs. In some countries, such as China, for instance, Facebook and Twitter are not available.

## Conference representation

Conference presence is a popular method for learning about opportunities in the literature. As such, the EL group believes it is another venue worth considering for future IRRT marketing of the SL program. Conference presence allows for networking and the ability to put faces with names in the program, as well as a forum for creating new relationships or building upon existing ones. The EL group recommends that the SL program establish a presence at ALA conferences, as they reach a broad audience from different locations and types of libraries. This presence could be in the form of an informational table, a panel discussion, or a member interest group meeting that would allow for informal presentation and open, face-to-face conversations about the program with a mentor (another of the EL group’s recommendations for successful, sustainable partnerships) or representative of the SL program. SL program representation is also recommended at conferences at the state and regional levels, which could become more feasible as additional partnerships emerge and a larger group of current participants becomes willing to share their experiences. Presence at state and regional venues would allow for more outreach to those who are unable to attend ALA conferences. A brochure could also be passed out at the conferences to draw attention to the SL program.

## Videos

Images and videos can convey messages in ways text cannot, such as showing people from two countries working together, or hearing directly from the SL Committee on their passion for SL relationships. The EL group recommends that IRRT create some short and informative videos that could be posted on the SL webpage and social media outlets. Video clips should be informative and highlight the benefits of the partnership, and they could potentially include brief interviews with SL partnership participants. Another short video could also point to resources that would allow for more detailed information about ways to participate in the program and could highlight any support opportunities available.

## Update brochure

To support the EL's recommendation for an increased conference presence, the ELs recommend that IRRT's current brochures are edited to be more concise for marketing purposes. A brief, catchy brochure should include information that directs the interested party to the the updated Wiki/website, social media outlets, and how to get in touch with a representative or "mentor" for the program.

## Recommendations: Updated and New Materials

In addition to the recommendations above, the EL group is providing new and/or updated information about Sister Libraries partnerships, as well as new documents to support the collecting and sharing of information about and marketing of the SL program. While this report does not include new materials based on all the recommendations above, the EL group thinks that those referenced here represent the most impactful documents for IRRT.

### *Updating and maintaining contacts*

As the ELs worked to contact librarians on a list of institutions involved in a SL partnership, they found that contact information was out-of-date. The ELs culled through the list of contacts and removed email addresses that returned a bounce-back message. This list was given to IRRT.

Additionally, to keep the IRRT website and SL database current, as well as to keep track of partnerships, it is recommended that a Google Form or Qualtrics survey is sent out yearly, asking contacts to provide updates on their relationship. Emails that are bounced-back should be removed from the contact list, or IRRT can follow up with the institutions to find a new contact. An example of a form or survey is in Appendix C. The benefits of using a Google Form or Qualtrics survey is that the information entered in the form can be exported to a spreadsheet, allowing for data manipulation and continued analysis. If using a Google Sheet, it can be shared online if participants agree that their information can be publicized.

### *Success stories*

While one goal of this project was to find and document new SL success stories, the open-ended questionnaire and survey could not identify new stories. However, the literature review found recent stories and articles about international library partnerships, and the ELs are recommending that IRRT highlights these articles on their website (ALA and Germany Unite, 2016; International Association of Library Associations and Institutions, 2016; Lee & Bolt, 2016). The form created to survey libraries for new contacts (Appendix C) can also be used to solicit and update success stories.

### *Template for Memorandum of Understanding*

One factor in successful SL relationships is having a formal, but flexible agreement (Doyle & Scarry, 1994; Hammond, 2009; Lee & Bolt, 2016; Ritchie, 2012). To aid partnerships in creating a formal agreement or Memorandum of Understanding (MOU), the ELs recommend

IRRT provides a template MOU. The template should include direction on filling out critical details that make partnerships successful, such as the terms, goals, and objectives of the partnership; expected benefits of the partnership; some indication of activities; primary and secondary contacts; and duration of the partnership. As seen in Appendix A, the ELs created a template MOU that is based on information from the literature review (Doyle & Scarry, 1994; Hammond, 2009; Lee & Bolt, 2016; Ritchie, 2012), responses to the open-ended questionnaire, and MOU templates (Centers for Disease Control and Prevention, n.d.; Doyle & Scarry, 1994, p. 35).

# Appendix A: Memorandum of Understanding Template

[Note from the authors: This Memorandum of Understanding (MOU) template was created for libraries seeking a Sister Libraries (SL) Partnership. This template lists many factors that should be discussed when entering a partnership. As relationships involve a variety of activities and stakeholders, some sections in this template may not apply to all SL partnerships, and this MOU may be missing key factors for certain partnerships. Additionally, because a flexible mindset is one factor in successful partnerships, it is advised that libraries write an MOU with an understanding that circumstances and needs will likely change over time.]

## Memorandum of Understanding

Between  
[Institution Name 1]  
and  
[Institution Name 2]

[Date]

This Memorandum of Understanding (MOU) sets for the terms and understanding between the [Institution Name 1] and the [Institution Name 2] to [summary of activity].

### Background

[Why partnership is important and/or expected benefits]

### Purpose and Activities

This MOU will [terms/purpose/goals/objectives of partnership]

The above goals will be accomplished by undertaking the following activities:

[List and describe the activities that are planned for the partnership and who will do what]

### Reporting

[Record who will evaluate effectiveness and adherence to the agreement and when evaluation will happen]

### Funding

[Describe who covers any costs, where the funds will come from, and who covers damages]

### Duration

This MOU is at-will and may be modified by mutual consent of authorized officials from [list partners]. This MOU shall become effective from [enter date partnerships begins] and will remain in effect until modified or terminated by any one of the partners by mutual consent. In the absence of mutual agreement by the authorized officials from [list partners] this MOU shall end on [end date of partnership].

[If the partnership has a trial period, describe how long the trial period will last and how to terminate or renew a trial]

[If the partners plan on reviewing and revising the MOU after a period of time to ensure it fits the organizations' needs and abilities, describe the review dates]

[If there are personnel exchanges, describe how long the exchanges will last and any dates]

## **Contact Information**

### ***Primary Contact***

Partner name  
Partner representative  
Position  
Address  
Telephone  
Fax  
E-mail  
Video conferencing

### ***Secondary Contact***

Partner name  
Partner representative  
Position  
Address  
Telephone  
Fax  
E-mail  
Video conferencing

### ***Primary Contact***

Partner name  
Partner representative  
Position  
Address  
Telephone  
Fax  
E-mail  
Video conferencing

### ***Secondary Contact***

Partner name  
Partner representative  
Position  
Address  
Telephone

Fax  
E-mail  
Video conferencing

**Communication Plan**

[Describe how parties will communicate and how frequently they will communicate]

\_\_\_\_\_ Date: \_\_\_\_\_  
[Partner signature]  
[Partner name, organization, position]

\_\_\_\_\_ Date: \_\_\_\_\_  
[Partner signature]  
[Partner name, organization, position]

# Appendix B: Potential Funding Opportunities and Grants

Below are some additional institutions that IRRT might find valuable to investigate, as they may be beneficial to SL partnerships and other programs. The ELs understand that IRRT plans to create a separate page on the Sister Libraries website, which could be a helpful venue on which to list these resources for potential Sister Libraries to explore and consider.

## **American Centers for Cultural Exchange**

<https://accex.squarespace.com/new-page/>

American Centers are located on university campuses in China. There is a list of the centers and university libraries that can be plugged to begin cooperation. An excellent example of such cooperation is one between Arizona State University Library and Sichuan University Library that began in 2007 (<https://lib.asu.edu/librarychannel/2007/11/29/the-sichuan-university-library-china-initiatives-series-part-three>). Both libraries exchange librarians once a year.

## **Bureau of Educational and Cultural Affairs**

<https://exchanges.state.gov/us> and <https://eca.state.gov/organizational-funding>

The Bureau of Educational and Cultural Affairs has various programs and grants, which may work well with a SL partnership. Specifically, the Fulbright Program (<https://eca.state.gov/fulbright>), which has several programs of varying lengths--from a few days to one- or two semesters. A Fulbright Program might provide the opportunity for a librarian to visit his/her SL and conduct research there.

## **WESS-SEES De Gruyter European Librarianship Study Grant (ACRL)**

<http://www.ala.org/acrl/awards/researchawards/wessgrant>

De Gruyter grants are available for a specific individual projects related to Europe and could potentially help develop U.S.-European SL partnerships.

## **EBSCO list of institutions**

[https://help.ebsco.com/?title=interfaces/EBSCO\\_Guides/Resources\\_for\\_Librarians/Grants\\_%26\\_Funding\\_Sources\\_for\\_Libraries](https://help.ebsco.com/?title=interfaces/EBSCO_Guides/Resources_for_Librarians/Grants_%26_Funding_Sources_for_Libraries)

Vendor EBSCO provides this list for informational purposes and further investigation. It is divided into non-governmental and state and federal resource sections.

## **Foundation Center Funding Information Network**

<http://foundationcenter.org/find-us>

There are interactive map listings of libraries and other institutions where one can find access to its database with information on grants.



## **International Federation of Library Associations and Institutions (IFLA)**

<https://www.ifla.org/funds-grants-awards>

IFLA's grants and scholarships are designed to foster training and professional development, as well as to support the development of innovative projects. Among awards referenced on the organization's website are the Jay Jordan IFLA/OCLC Early Career Development Fellowship, which supports professionals from developing countries, and grants and awards to attend the World Library and Information Congress.

## **State Library Associations**

Some of the ALA state library organization might also have fellowships/committees that would be interested in awarding a SL grant. For example, the Horner Fellowship (<http://www.azla.org/?page=hornerfellowship>), administered through Arizona Library Association, facilitates informational exchanges between Arizona and Japanese librarians. A special project grant for a librarian to do a project with a SL partner library in Japan or Arizona could potentially be awarded.

## **Sister Cities International**

<http://www.sister-cities.org/>

Sister Cities International and/or participating cities might be willing to support an exchange program between the public libraries or even academic libraries in two already established Sister Cities.

# Appendix C: Form to Maintain Contacts and Partnerships

*\* Mandatory field*

**Your name\*** [short answer text box]

**Your email\*** [short answer text box]

**Your institution's name\*** [short answer text box]

**Your institution's location** (*Format: city, state (if applicable), country. No abbreviations, please*)\* [short answer text box]

**Name of the Sister Library institution you partner with\*** [short answer text box]

**Location of the institution you partner with** (*Format: city, state (if applicable), country. No abbreviations, please*)\* [short answer text box]

**Main contact at the institution you partner with** [short answer text box]

**Main contact's email or other contact information** [short answer text box]

**Please describe your Sister Library partnership and a success story of applicable**  
[paragraph/long answer text box]

Our website publicizes Sister Library partnerships. May we share on our website the name of your institution, the name of your Sister Library's institution, and a description of your project?\*

[Radio buttons: Yes, No, Please contact me to discuss further]

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