

Building a Grey Literature Clearinghouse on Families in Canada: Early Insights into Relationship-Building and Metadata Crosswalks

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Abstract

This paper presents insights into an initiative to expand the Vanier Institute of the Family's grey literature platform by integrating externally produced grey resources, advancing the Institute's strategic vision of becoming a one-stop, trusted hub for information on families in Canada. The Institute, a non-profit think tank that produces grey literature, is broadening its Resource Centre to include materials from organizations across family research, policy, and practice. The project aims to improve the visibility and accessibility of grey evidence in family science. This work is conducted by a team of six, making these early developments particularly significant, as they were achieved under resource constraints and showcase the strategic choices, efficiencies, and adaptability required to advance such an initiative.

Central to this work is the cultivation of partnerships with grey literature producers, enabling collaborative decisions about the stewardship, description, and maintenance of contributed materials while respecting the varied contexts in which they are produced.

Trust was strengthened by understanding the contributors' goals for the impact of their work. We created mock-up records of their resources to illustrate our metadata quality, which built confidence in their representation on our platform. Co-creating descriptive metadata further reinforced contributors' assurance that their work would be accurately described. In addition, we developed memoranda of understanding to clarify roles and affirm their authority to select which resources to feature, respecting their data sovereignty and strengthening their commitment to the collaboration.

We also describe the process of developing metadata crosswalks to align diverse contributor metadata with our metadata schema, guided by FAIR (Findable, Accessible, Interoperable, and Reusable) data principles. Key insights include the necessity of flexible funding and rights attribution statements to distinguish between funder, authorship, publisher, and stewardship roles, as well as the adoption of practices to support node links so contributors can maintain their resources while providing users with clear access. These are just some of the relational and technical considerations involved in creating metadata crosswalks to expand a grey literature platform in a small organization.

Anticipated outcomes include more consistent and interoperable metadata across contributors, improved discoverability of information on families, enhanced organizational strategies for building relationships with grey literature producers, and evolving practices for managing multi-contributor metadata alongside our own grey resource production. Insights may support resource-constrained organizations in navigating metadata crosswalk development and fostering relationships with grey literature producers to advance efforts to make grey resources more visible, connected, and actionable.

Keywords: grey literature, metadata crosswalks, FAIR principles, partnership building, data sovereignty, resource centre, families in Canada

1. Introduction

The Vanier Institute of the Family, an independent national think tank dedicated to advancing the wellbeing of families in Canada, creates and shares grey literature about families and works to make that evidence accessible, written in plain language, and actionable for researchers, educators, policymakers, practitioners, and organizations with an interest in families in Canada. This places the Institute within a broad network of organizations working across family research, policy, and practice.

Grey literature on families in Canada can be difficult to discover. It is produced by many organizations and dispersed across multiple platforms, each with its own publication practices and metadata conventions. As a result, users often need to search multiple websites individually and already know which organizations work in a particular area to locate relevant resources. While valuable information exists across this landscape, finding it can be time-consuming and fragmented.

In response to this challenge, the Institute began expanding its existing [Resource Centre](#) to include grey literature on families produced by other organizations alongside its own publications. The goal is to create a trusted, one-stop information hub that increases the reach, access, and visibility of evidence about families in Canada.

This paper shares early insights from that initiative. It reflects on the experience of a small, resource-constrained team building a multi-contributor grey literature platform. The discussion focuses on four themes that emerged throughout the project and that mirror how the work unfolded: the operational approach a small team used to manage a complex initiative; the relationship-building work that had to precede any metadata decisions; and the metadata crosswalk challenges that emerged once partnerships were in place. We close with a discussion of what these early developments suggest for other resource-constrained organizations undertaking similar work.

2. Background Context and Approach

The size of the team was an important consideration throughout the project. With six staff members, the Institute was managing contributor outreach and relationship-building, metadata development and quality assurance, translation, communications, and website development alongside its other ongoing work. As the initiative developed, it became clear that incorporating externally produced resources involved much more than creating and publishing metadata records.

Each partnership required its own discussions, review processes, and decisions about how the contributor's resources would be described and presented. Questions that initially appeared to be technical often required consultation with the contributing organization before the team could move forward. Establishing the first partnerships and developing the processes needed to support them took approximately a year and a half. This work continues to evolve as the Institute maintains existing partnerships and considers how to expand the Resource Centre sustainably.

The team did not begin with a fully developed structure for coordinating all aspects of the initiative. Different parts of the project were progressing alongside one another while the team

was still identifying the tasks, dependencies, and people involved. As the scope became clearer, the team recognized that the work was more complex than initially anticipated.

To coordinate the growing body of work, several workflow streams were eventually established and tracked: website development, metadata creation, quality assurance, and translation. These streams reflected what the team had learned while carrying out the work rather than a plan established at the beginning. The project management structure helped make the different workflow streams more visible and clarified how they related to one another.

Within each contributor relationship, metadata records moved through an iterative process of drafting, partner review, revision, and approval. Metadata creation and quality assurance were centralized with the Information Specialist to help maintain consistency across contributor records.

Partnerships often began informally through conference conversations or with organizations identified through environmental scans, and the collaboration process became more formal over time. The team developed and refined its internal processes as the work progressed, including timelines, review procedures, and the division of responsibilities. Because new questions and requirements emerged along the way, managing the team's capacity remained an ongoing part of the work. This context shaped both the relationship-building and metadata decisions discussed in the following sections.

3. Building Relationships with Contributor Organizations

Although the initiative is ultimately reflected in metadata records published through the Resource Centre, developing those records required ongoing collaboration with contributor organizations. Decisions about how resources would be selected, described, attributed, and accessed could not be made by the Institute alone. Building relationships with contributors was therefore an integral part of the work.

3.1 Learning about prospective contributors

Before contacting a prospective contributor, the team reviewed the organization's mandate, publications, and broader context. This helped the team understand the organization's work and consider how participation in the Resource Centre might support its goals. It also meant that initial conversations could be grounded in the organization's actual work and how the initiative could support its mandate, rather than in a generic description of the initiative.

Early conversations provided an opportunity to further learn what mattered to each contributor, including how they wanted their work to be represented and what they hoped to gain from participating. This information helped shape the collaboration and informed later decisions about resource selection, metadata, attribution, and access.

3.2 Developing a shared understanding

The same approach to formalizing a partnership was not necessarily appropriate for every contributor. In one partnership with a First Nations organization, the Institute developed a shared-understanding document rather than the same memorandum of understanding used in

other partnerships. The document had more explicitly collaborative language and emphasized the contributing organization's role in decisions about how its knowledge would be represented.

The shared-understanding document included the following principles:

"As we work together, we are guided by the following principles: Respect for Indigenous knowledge, leadership, and self-determination; Humility in knowing our role is to support, not to lead or shape the narrative; Openness in how we communicate, listen, and adjust along the way; Care in how resources are shared and framed (e.g., descriptive metadata)."

This language reflected an effort to establish the Institute's role as a supporting partner and to recognize the contributor organization's authority over its own resources. It also provided a foundation for later decisions about descriptive metadata and how users would access the organization's materials.

3.3 Using mock-up records to make the project concrete

Early in each partnership, the team created a few mock-up records to show how the contributor's resources could appear in the Resource Centre. These records included elements such as the organization's branding, descriptive metadata, and links directing users to the original resources.

The mock-ups gave contributors something concrete to review and supported discussion about how their work would be represented. Contributors could identify changes or raise questions before more records were created. The mock-ups also tangibly demonstrated that the Resource Centre was intended to increase the reach and visibility of their resources while directing users back to their own platforms.

For the Institute, creating these sample records also helped identify metadata questions that needed to be resolved with the contributor before the work expanded. The mock-ups therefore functioned as both an early quality-assurance step and a starting point for collaborative metadata development.

3.4 Clarifying roles and responsibilities

As partnerships became more established, the Institute used memoranda of understanding or, as previously described, where appropriate, an adapted shared-understanding document, to clarify how the collaboration would proceed. These documents addressed responsibilities related to the selection, description, stewardship, and ongoing maintenance of contributed resources. They also affirmed that contributors retained the authority to decide which of their resources would be included.

The form and language of these documents varied according to the context of the partnership, but their practical purpose was similar: to give both organizations a shared understanding of their respective roles and how decisions would be made. These discussions continued beyond the signing of a document, particularly when new metadata, rights, or access questions emerged.

4. Metadata Crosswalk Development

As work with contributor organizations progressed, the team began developing metadata crosswalks to align information about externally produced resources with the Institute's existing metadata schema. This required determining how information supplied by contributors or available through their platforms would correspond to the Institute's fields and identifying situations in which the existing schema did not adequately accommodate external resources.

The FAIR principles (Findable, Accessible, Interoperable, and Reusable) provided a useful reference point for this work. However, they did not prescribe a single response to every question that emerged. Each contributor brought different publication practices, terminology, rights arrangements, and approaches to resource access. The following four examples illustrate some of the decisions the team encountered while developing the crosswalks.

4.1 Distinguishing attribution roles

The Institute's metadata schema was originally developed for its own publications, where the roles of author, publisher, funder, and copyright holder were generally known. Externally produced resources introduced more varied arrangements. In some cases, the available source information did not clearly distinguish between these roles; in others, several organizations had contributed to a resource in different ways.

The team worked with contributors to clarify these roles and determine how they should be represented in the Resource Centre. This included developing appropriate entries for the Funding field and ensuring that funding was not presented as authorship or publication. Although these distinctions could appear minor within an individual record, they were important for accurately representing how a resource had been produced and ensuring that the organizations involved received appropriate attribution.

4.2 Balancing direct access with contributor authority

The Institute's usual practice was to link users as directly as possible to a resource, such as to a PDF or its main publication page. This approach was intended to reduce the number of steps required to access the material.

With one contributor's platform, however, resources had to be accessed via a node link maintained by the contributor rather than through a direct link from the Resource Centre. This allowed the organization to retain control over how users accessed its materials and to maintain the links on its own platform.

The team adopted this approach even though it introduced an additional step for users. In this instance, respecting the contributor's authority over access to its resources took precedence over the Institute's usual preference for fewer clicks. The decision also demonstrated that accessibility could not be considered only in terms of speed or convenience; it also needed to account for the conditions under which a contributor chose to make its knowledge available.

4.3 Separating publisher and collection information

The Institute's Publisher field was developed for its own publications, where the Institute was both the source organization and the publisher. This distinction became less straightforward when external resources were added. A resource could be written by one organization,

published by another, and held under copyright by a third party. Using the Publisher field to identify the contributor organization in every case would therefore risk misrepresenting its actual role.

To address this issue, the team introduced a separate Collection field. This allowed resources associated with a contributor to be grouped and discovered together without identifying that organization as the publisher when it had not performed that role. Keeping publisher and collection information in separate fields also helped preserve a consistent meaning for each field as new contributors and resource types were introduced.

4.4 Creating descriptions within copyright limitations

Copyright considerations also affected how some resources could be described. For certain publications, particularly journal articles, the original abstract could not be reproduced directly in the Resource Centre's Description field because of copyright limitations. Instead, the team prepared a new plain-language description that summarized the resource in its own words. These descriptions were shared with the contributor organization for review, revision, and approval. This helped ensure that the new wording remained accurate while avoiding the direct reproduction of copyrighted text.

What initially appeared to be routine metadata field creation therefore became a collaborative writing and review process. Producing an original description required the team to understand the resource, identify its central points, communicate them clearly, and confirm with the contributor that the meaning had been represented accurately. This process added time to the development of each record but was necessary for creating descriptions free from copyright infringement.

4.5 Summary

These examples demonstrate that developing metadata crosswalks for externally produced resources involved more than matching one field to another. It required the team to examine assumptions built into a schema originally created for the Institute's own publications and determine whether those assumptions still held when resources from other organizations were introduced.

The FAIR principles helped the team frame questions about discovery, access, consistency, and reuse, but the specific decisions still required consultation and judgment. Attribution, access routes, field definitions, and resource descriptions were not only technical matters; they also affected how contributors and their work were represented through the Resource Centre.

5. Discussion: What We Learned

5.1 Relationship-building continues throughout the metadata work

Relationship-building and metadata development did not occur as separate stages. Although initial conversations and partnership documents helped establish how the organizations would work together, collaboration continued as records were drafted and new questions emerged. Contributor review helped the team clarify attribution, develop accurate descriptions, and decide how resources would be presented and accessed. This meant that time for consultation could not be limited to the beginning of a partnership. It needed to be included throughout the creation and maintenance of contributor records.

5.2 Metadata crosswalks evolve as new content is introduced

A metadata schema that works for an organization's own publications may not accommodate externally produced resources in the same way. Each new contributor and resource type can introduce circumstances that the existing schema was not designed to address.

In this project, questions about attribution, access routes, copyright, and the distinction between publisher and collection information led the team to reconsider some of its existing fields and practices. Crosswalk development was therefore not a one-time exercise in matching fields. It was an iterative process that required the team to respond to new cases while maintaining as much consistency as possible across the Resource Centre.

FAIR principles provided a useful way to consider discoverability, access, interoperability, and reuse. However, applying those principles still required case-by-case decisions based on the resource, the contributor's context, and the Institute's own technical and organizational capacity.

5.3 Scope and coordination needs increase quickly

The project also demonstrated how quickly the work associated with a multi-contributor platform can expand. Adding a contributor involved more than adding another set of records. It also introduced further relationship management, review and approval processes, metadata decisions, website requirements, translation, and communications work.

The decision to create bilingual metadata is one example. It increased the work associated with each record and introduced additional coordination around translation and review. Other decisions could similarly affect several workflow streams, even when they first appeared limited to one part of the project.

For a team of six, managing this work required ongoing adjustments to timelines, responsibilities, and priorities as the project developed. Capacity needed to be reconsidered as new contributors, resources, and requirements were introduced. These lessons show that sustaining a multi-contributor Resource Centre depends on both external collaboration and internal coordination. The metadata work cannot be separated from the relationships and organizational processes that make it possible.

6. Conclusion and Anticipated Outcomes

This paper has shared early insights from the Vanier Institute of the Family's ongoing work to expand its Resource Centre to include grey literature produced by contributor organizations. The experience to date has shown that incorporating externally produced resources involves more than developing metadata crosswalks and publishing records. It also requires ongoing collaboration with contributors about how their resources will be selected, described, attributed, maintained, and accessed.

For the Institute, this work has included learning about prospective contributors, developing partnership documents suited to different contexts, using mock-up records to support early discussions, and creating processes for contributor review and approval. It has also required the team to reconsider aspects of a metadata schema originally developed for the Institute's own publications. Questions about attribution, access, field definitions, copyright, and plain-language descriptions emerged as external resources were introduced.

As the initiative continues, the Institute aims to improve the consistency and interoperability of metadata across contributor collections and increase the reach, visibility, and discoverability of evidence about families in Canada. The team will also continue refining its processes for developing and maintaining contributor relationships and for managing externally produced resources alongside the Institute's own publications. The Institute's experience also offers a practical example of how a small non-profit organization has approached the early stages of building a multi-contributor grey literature platform. Although the specific decisions described in this paper reflect the Institute's own context and partnerships, they may help other resource-constrained organizations anticipate the relationship-building, metadata, and coordination work involved in similar initiatives.

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