

# Collaboratively Maintaining Scholarship

ADDRESSING SOCIO-TECHNICAL SCHOLARLY COMMUNICATION CHALLENGES

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# EDU∞PIA INSTITUTE

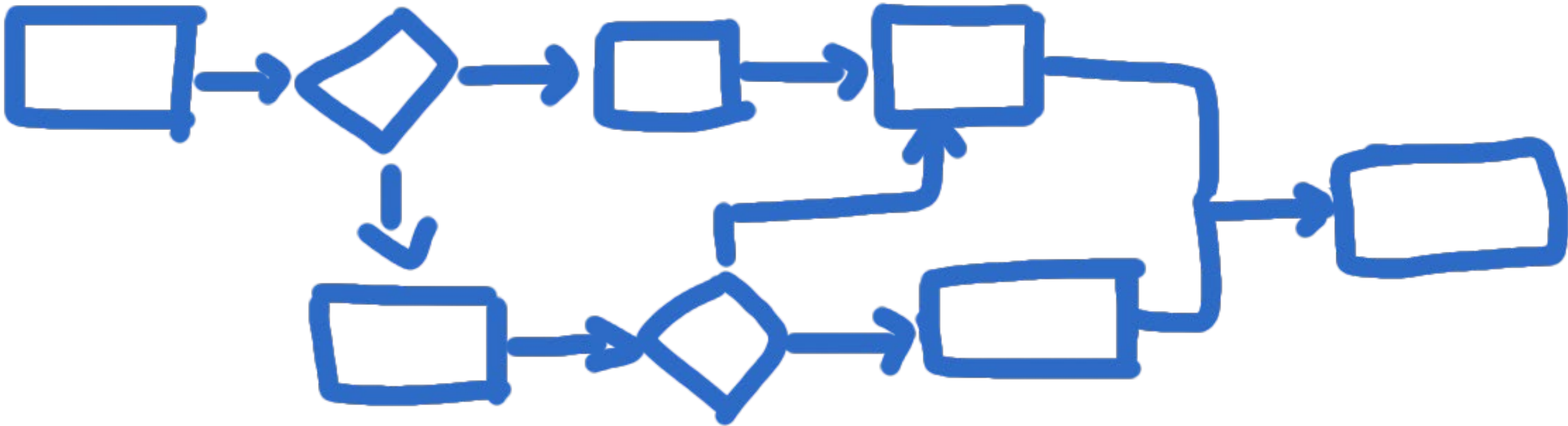


Photo by Jessica Ruscello, Unsplash

# Preservation is not a one-time activity

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It is an ongoing process




# Digital Preservation

*Ingest* Format Validation **Audit** Storage  
Fixity Checking Geographic Replication  
Access *Repair* Data Wrangling  
Metadata Testing *Trust* **Rights** (etc...)

“The series of ***managed activities*** necessary to ensure continued access to digital materials for as long as necessary.” - *Digital Preservation Coalition*

# Problem 1: Preservation's not happening



Library  
Publishing  
Coalition


ABOUT US COMMUNITY EVENTS RESOURCES GET INVOLVED

MEMBER LOG IN

## Promoting innovative, sustainable publishing services in academic & research libraries

The Library Publishing Coalition (LPC) fosters collaboration, knowledge-sharing, and the development of common practices for library publishers. Our goal is to explore how to better serve the scholarly communication needs of the academic community, through sustainable, innovative library publishing solutions aligned with institutional missions.

LPC membership is open to academic and research libraries and library consortia seeking to explore and define new publishing solutions. We actively seek strategic alliances and connections to organizations with similar values and interests.



**EVENT ANNOUNCEMENT:**  
Join us for the 2017 Library Publishing Forum, March 20 - 22, 2017 in Baltimore, MD!



### Announcements



Announcing the inaugural recipients of the LPC Award for Outstanding Scholarship in Library Publishing: Ann Okerson and Alex Holzman.  
[More >](#)

New resource: The LPC's Library Publishing Bibliography.  
[More >](#)

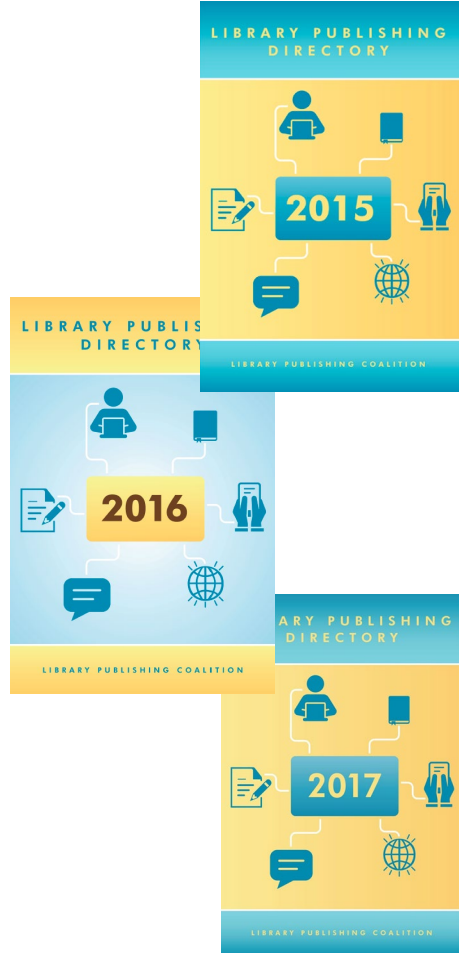
Visit our new Job Board for open library publishing jobs and an archive of past listings.  
[More >](#)

### Twitter

**Library Publishing** @LibPubCoalition  
We are pleased to announce a new #LPForum17 sponsor: @Veruscript. Thanks for supporting the Library Publishing Forum!  
 03 Mar

**Library Publishing** @LibPubCoalition  
One week left to register for the 2017 Library  






## University Library Publishers' Reported Preservation Platforms

	<b>2015</b> (124 respondents)	<b>2016</b> (115 respondents)	<b>2017</b> (118 respondents)	<b>2018</b> 120 respondents
AmazonS3/Glacier	7	6	8	15
APTrust	3	7	6	5
Archive-It	11	13	12	10
CLOCKSS	14	13	14	15
DuraCloud	9	7	7	7
DPN	10	11	10	13
HathiTrust	14	18	21	23
LOCKSS	28	29	31	35
MetaArchive	11	11	9	10
Portico	15	21	20	23
Preservica	0	0	2	4
ScholarsPortal	0	4	5	3
in-house	50	53	52	54
under discussion	50	46	41	40
none	2	1	2	?

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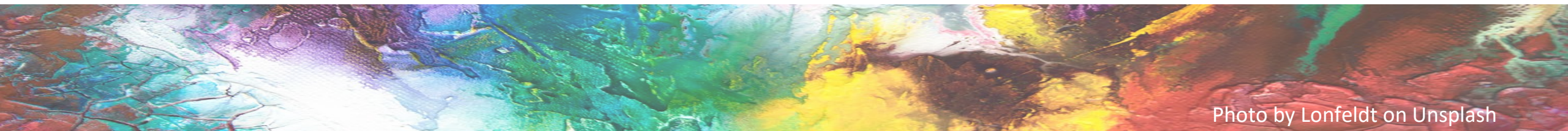
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Ummm...preservation?

# Problem 2: Preservation environments

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- Services and communities
- Many are unstable
  - Financial models
  - Staff/volunteer networks
  - Community engagement
  - Governance
- Unprepared for transition and change



# Just a small, relatively random sample



**OhioLINK**

Connecting Libraries, Learning & Discovery  
A Division of the Ohio Department of Higher Education  
An **OH-TECH** Consortium Member



Digital **Preservation** Coalition



**BitCurator**



**ArchivesSpace**



**slandora**



**HATHI TRUST**  
a shared digital repository



**Washington  
Research  
Library  
Consortium**



**hydra**



**Software  
Preservation  
Network**



**COPPUL**  
The Council of Prairie and  
Pacific University Libraries



**NDSA**



**INDIANA  
DIGITAL  
PRESERVATION**



**D P L A**  
DIGITAL PUBLIC LIBRARY OF AMERICA  
visit [dp.la](http://dp.la)



**PKP**  
PUBLIC  
KNOWLEDGE  
PROJECT



**Software  
Heritage**  
PRESERVING TECHNICAL KNOWLEDGE



**CLOCKSS**



**VIVO**  
connect • share • discover



**HBCU**  
Library Alliance



**recollection**  
WISCONSIN



**MetaArchive**  
COOPERATIVE



**DURA  
SPACE**



**ACADEMIC  
PRESERVATION TRUST**



**LOCKSS**



**borrowdirect**



**aserl**

ASSOCIATION OF SOUTHEASTERN RESEARCH LIBRARIES

# What does a community need?

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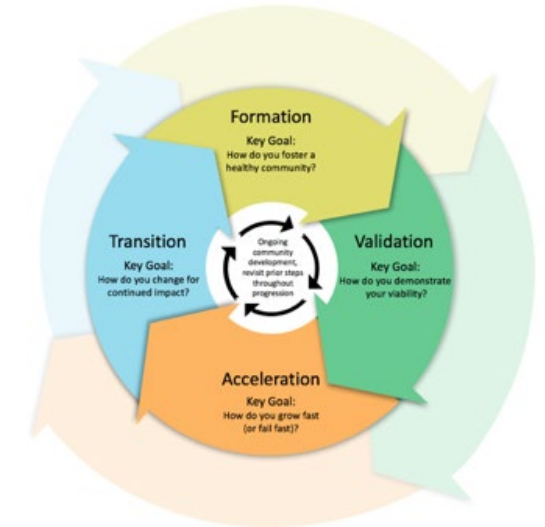
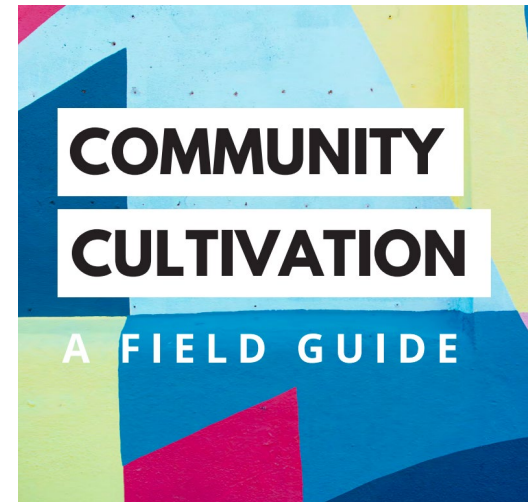
- Network of common experiences
- Strategies and models for growth
- Ways to recognize opportunities
- Ways to handle transition and change effectively



# Community Cultivation Field Guide Purpose:

To help communities assess their current strengths, then pinpoint appropriate tools and activities to assist in their maturation.

*Community Cultivation Field Guide* available at:  
<http://educopia.org/cultivation> (free and open)

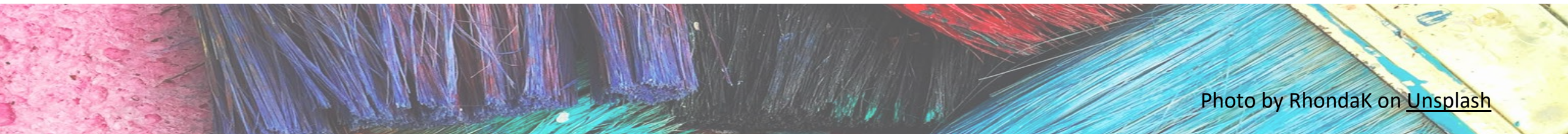


	Formation How do you foster a healthy community?	Validation How do you demonstrate your viability?	Acceleration How do you grow fast (or fail fast)?	Transition What structure(s) do you need for continued impact?
<b>Vision</b>	establish & document mission, vision, values with community leadership; set initial goals (1-3 yr); pilot services/products	externally articulate mission, vision, values; test, evaluate, & improve services/products; conduct SWOT, market analysis, establish brand	build strategic plan & evaluation measures; demonstrate ROI & impact; monitor landscape; scale up services/products	revisit mission, vision, values; identify service/product gaps & challenges; consider landscape changes and opportunities
<b>Infrastructure</b>	establish communications & administrative structure; document current dependencies (e.g., host organization(s), service providers) and exit strategies	refine communications and administrative structures; create communications plan; explore relationship management (CRM) and digital preservation tools	implement communications plan; streamline member onboarding; add relationship management & digital preservation tools and strategies	evaluate platforms and operations; establish new communications & administrative support as necessary for transition(s)
<b>Finances and HR</b>	establish administrative costs; evaluate HR needs; create financial plan; document fiscal milestones	test financial plan; build accounting framework, COA, and manuals; establish financial reserves; ensure HR structure supports staff and complies with laws	diversify funding streams; cover operational costs + 10% (reserves); fundraise for reserves as necessary; evaluate growth/scaling	analyze income/expenses; explore available/needed resources to support change; consider endowment-building activities; evaluate/adjust HR infrastructure
<b>Engagement</b>	foster relationships, establish subgroups & regular meeting schedules; document who is engaged	give credit/awards to community members for engagement; formalize committee rules & processes; engage strategic affiliates, begin regular reporting to community	broadcast services & products through community members and affiliates; effectively engage new members/affiliates, exercise the community's voice within the broader field	maintain transparency about changes; identify & pursue key relationships in support of the transition(s); survey/interview members and strategic affiliates to help identify new directions
<b>Governance</b>	establish/grow community leadership; document governance procedures; establish member MOUs/contracts if needed	formalize leadership group, name leadership roles and create descriptions, refine and formalize governance procedures	spin up leadership subcommittees as needed; cultivate next-generation leaders	evaluate governance policies and procedures and revise as necessary; if significant changes are needed, maintain openness about them

# Using the Model

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- Assess a community's current stability and sustainability
- Pinpoint specific activities/tools that can help
- Establish ways to evaluate progress
- Plan a pathway for growth and maturation
- Understand when a community needs to transition, spin off, or spin down



# Lifecycle Stages

## Formation

A community organizes and articulates an ethos and culture.

## Validation

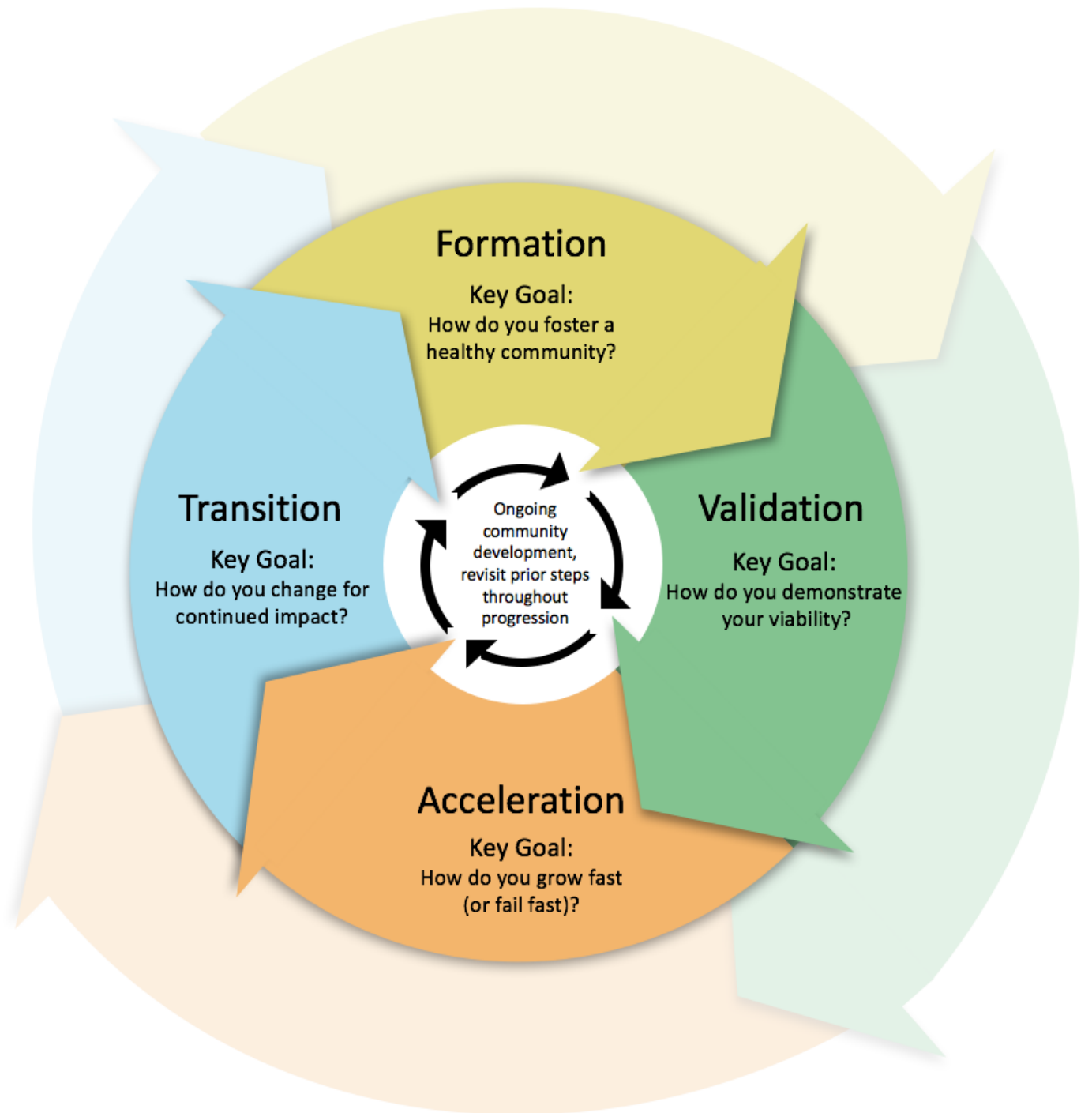
A community demonstrates its value and validity, attracting new members.

## Acceleration

A community seeks to demonstrate its scalability and its stability.

## Transition

A community engages in a deliberate change process to remain vibrant and relevant.



# Growth Areas



## Vision

Who are we, what do we do, and how do we do it



## Infrastructure

How we communicate, what tools we use, and how we track activities and relationships



## Finances and HR

How to manage accounting structures, fiscal planning, and HR



## Engagement

How to recruit members, design committees, and ensure community participation



## Governance

How to design a governance structure, document bylaws, and train leaders



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