Building a stronger, healthier, more equitable information management field begins with the way we care for each other.
I’ve never been prouder to be part of this organization or more certain of its impact on our field and in our world.

In 2019, we joined forces with more than fifteen emerging and established collaborative efforts, providing each with specialized administrative, governance, and facilitation tools designed to harness the energy and resources of many institutions in a united direction.

We helped two nascent efforts—the Coalition for Diversity and Inclusion in Scholarly Communication (C4DISC) and the Maintainers network—to establish roots and begin to grow. We also supported the expansion of the Software Preservation Network (SPN), and we conducted a range of strategic planning, facilitation, training, and community alignment activities for Educopia’s three Affiliated Communities.

We undertook research geared toward field-level change with generous funding from the Institute of Museum and Library Services, the Andrew W. Mellon Foundation, the Alfred J. Sloan Foundation, and Arcadia, a charitable fund of Lisbet Rausing and Peter Baldwin.

In this work, we developed a standard methodology for documenting workflows and analyzing the impact of both human and technical drivers on digital archiving and library publishing (OSSArcFlow, Library Publishing Workflows).

We produced the first-ever Census of Scholarly Communications Providers, in which we studied and documented the vision,
Since 2006, Educopia has nurtured collaborative networks of libraries, archives, museums, and publishers in order to expand the creation, dissemination, and preservation of knowledge.

governance, community engagement efforts, administrative infrastructures, and financial activities for over 40 Scholarly Communications Providers. We published our findings in an open report and we summarized our observations in a blog post that has been viewed over 2,000 times. In the blog post, we asked “Why Are So Many Scholarly Communication Infrastructure Providers Running a Red Queen’s Race?”

We also began tying each of these organizational elements (e.g., financial activities, governance models) to an assessment framework designed to help these service providers openly demonstrate how their work relates to the values and principles espoused by their academic clients and collaborative partners (Next Generation Library Publishing).

Until recently, our work at Educopia was limited to the set of partners our nimble team could “touch” through consulting, grants, or affiliated community engagements. 2019 marked an important expansion of our impact as we began sharing, openly and freely, the model that centers our work: “Community Cultivation: A Field Guide” (CCFG). Published in November 2018, this work chronicles the lifecycle model developed through our research and collaborations with more than two dozen communities. It is now being used across the field of information management and also in adjacent fields including technology and general nonprofit and NGO management.

But for me, what made 2019 truly stand out was the internal work of our team to ensure that everything we do at Educopia springs directly from our mission, vision, and values. As our team and our portfolio grew, we invested in training, onboarding, and staff development to make sure that we all embody the traits we believe are most transformative in the world: care and inclusivity, connectivity and openness, integrity and radical transparency. We also pledged our time and energy to volunteer efforts supporting equity, diversity, and inclusion across our field, including through research, writing, and co-facilitating the “Be the Change” event in partnership with DeEtta Jones and Associates.

Today, I want to celebrate with you all. 2019 was a powerful and resounding “YES” year—one in which we witnessed the impact of our work at the institutional and individual level, and across both field-based and national borders.

Katherine Skinner
Executive Director
Community Members, Staff, and Board

Library Publishing Coalition

Atla
Binghamton University
Boston College
California Digital Library
California Polytechnic State University
Caltech
Carnegie Mellon University
Claremont Colleges Library
Colby College
Columbia University
Cornell University
Dartmouth College
Dublin Business School
Emory University
Florida State University
George Mason University
Grand Valley State University
Illinois Wesleyan University
Indiana University
Indiana University—Purdue University Indianapolis
Iowa State University
James Madison University
Kansas State University
La Trobe University
Library of Congress
Lynn University
Macalester College
McGill University
Minitex
Northwestern University
Ohio State University
Pacific University
Penn State University
Pepperdine University
Portland State University
Private Academic Library Network of Indiana
Purdue University
Rutgers University
Simon Fraser University
SUNY Geneseo
Syracuse University
Temple University
Texas Tech University
Tulane University
Université du Québec à Montréal
University College London (UCL) Libraries & UCL Press
University of Alberta
University of Arizona
University of California, Santa Barbara
University of Cincinnati
University of Florida
University of Georgia
University of Guelph
University of Houston
University of Illinois at Chicago
University of Illinois at Urbana-Champaign
University of Iowa
University of Kentucky
University of Louisville
University of Maryland
University of Massachusetts Amherst
University of Massachusetts Medical School
University of Miami
University of Michigan, Ann Arbor
University of Minnesota
University of New Brunswick
University of North Carolina at Greensboro
University of North Texas
University of Ottawa
University of Pennsylvania
University of Pittsburgh
University of South Florida
University of Tennessee
University of Texas at Arlington
University of Virginia
University of Washington
University of Western Ontario
University of Wisconsin-Madison
Villanova University
Virginia Commonwealth University
Virginia Tech
Wake Forest University
Washington University in St. Louis
Wayne State University
Weill Cornell Medicine—Qatar
West Virginia University
MetaArchive Cooperative

Auburn University
Boston College
California Polytechnic State University
San Luis Obispo
Carnegie Mellon University
Consorti de Serveis Universitaris de Catalunya
Greene County Public Library
Historically Black Colleges and Universities Library Alliance
Indiana State University
Isabella Stewart Gardner Museum
Ohio University
Oregon State University
Penn State University
Pontificia Universidade Católica do Rio de Janeiro
Purdue University
Rockefeller Archive Center
University of Louisville
University of North Carolina at Greensboro
University of North Texas
Virginia Tech University
Washington Research Library Consortium
Williams College

BitCurator Consortium

Arizona State University
Arizona Universities Library Consortium
British Library
Canadian Centre for Architecture
Cornell University
Duke University Libraries
Emory University
Gates Archive
Harvard University Libraries
Library of Congress
Maryland Institute for Technology in the Humanities
McMaster University
Massachusetts Institute of Technology (MIT)
New York University
North Carolina State University
Northern Arizona University
Northwestern University Library
Penn State University Libraries
Princeton University
Public Record Office Victoria
Purdue University Libraries
Rockefeller Archive Center
Smithsonian Institution Archives
Stanford University
UCLA Libraries
University of Arizona Libraries
University of California, Irvine
University of California, San Francisco
University of Colorado
University of Illinois at Urbana-Champaign
University of Manchester
University of Maryland
University of Melbourne
University of North Carolina at Chapel Hill: SILS
University of Ottawa
University of Virginia Library

Software Preservation Network

Computer History Museum
Cornell University
Duke University
Georgia Tech
Harvard/Smithsonian Center for Astrophysics
Living Computer Museum + Labs
Massachusetts Institute of Technology (MIT)
New York University
Pennsylvania State University
Software Sustainability Institute
Stanford University
Texas Tech University
University of Arizona
University of Illinois at Urbana-Champaign
University of Michigan
University of North Carolina at Greensboro
University of Texas at Austin
University of Virginia
Yale University
Evaluating the Community Webs
Internet Archive
Fostering a Community of Practice: Software Preservationists and Emulation Experts in Libraries and Archives (FCoP)
CalPoly State University
Georgia Tech
Guggenheim Museum
Living Computers: Museum + Labs
University of Arizona
University of Illinois
University of Virginia
Library Publishing Curriculum
Association of American University Presses (AUPresses)
Blue Sky to Blue Print
Ivins eContent Solutions, SSP
Mason Publishing/George Mason University Press
NASIG
Pacific University
Public Knowledge Project (PKP)
University of Florida
University of Illinois at Urbana-Champaign
University of Massachusetts Amherst
University of Michigan
University of South Florida
University of Tennessee
University of Wisconsin Press
University Press of Florida
Sarah Lippincott
Simon Fraser University
St. Mary’s College of Maryland
Stanford University
Temple University Press
Valparaiso University
Wayne State University
Library Publishing Workflows
Atlanta University Center
California Digital Library
Claremont Colleges
Columbia University
Illinois Wesleyan University
Massachusetts Institute of Technology (MIT)
OCLC Research
Pacific University
University of Alberta
University of Michigan
University of Pittsburgh
University of Redlands
Virginia Tech
Wayne State University
The Maintainers: Building and Sustaining Maintenance Communities
SUNY Polytechnic Institute
Virginia Tech
Maintainers III: Policy, Practice, and Care
SUNY Polytechnic Institute
Virginia Tech
Mapping the Scholarly Communications Landscape
Middlebury College
TrueBearing Consulting
Next Generation Library Publishing
California Digital Library
Confederation of Open Access Repositories (COAR)
Crossref
Emory University
Grand Valley State University
Ithaka S+R
Montreal Neurological Institute
North Carolina State University
Longleaf Services
LYRASIS
SPARC
Stratos
University of California Press
University of California, San Francisco
University of California, Santa Barbara
University of Delaware
University of Illinois
University of North Carolina Press
University of Pennsylvania
University of San Francisco
Coalition of Open Knowledge Institutions
Curtin University
OSSArcFlow
Artefactual
Atlanta University Center
District of Columbia Public Library
Duke University
Emory University
Kansas Historical Society
LYRASIS
Massachusetts Institute of Technology
Mount Holyoke College
New York Public Library
New York University
Odum Institute, UNC Chapel Hill
Rice University
Stanford University
University of North Carolina at Chapel Hill - SILS

Preserving Electronic Government Information (PEGI)
Arizona State University
Center for Research Libraries
Stanford University
University of Missouri
University of North Carolina at Greensboro
University of North Texas
Yale University

Sustaining Digital Curation and Preservation Training
AVP
Coalition to Advance Learning in Libraries, Archives, and Museums

Digital POWRR (Northern Illinois University)
Digital Preservation Network
George Coulborne (Independent Consultant, Digital Preservation Outreach and Education-DPOE)
Lead. By Design.
LYRASIS
Northeast Document Conservation Center (NEDCC)
OCLC-Webjunction
Sustainable Heritage Network (Washington State University)

Staff
Nancy Adams, Program Assistant (began 03/2019)
Hannah Ballard, Director of Communications
Alex Chassanoff, Research Program Officer (departed 08/2019)
Emma de Francisco, Business Manager (began 12/2019)
Jessica Farrell, Community Facilitator
Brandon Locke, Project Manager (began 09/2019)
Sam Meister, Preservation Communities Manager (departed 09/2019)
Jessica Meyerson, Director of Research & Strategy
Caitlin Perry, Communications and Administrative Coordinator
Melanie Schlosser, Directory of Scholarly Communications
Matt Schultz, Director of Digital Curation and Preservation (began 10/2019)
Katherine Skinner, Executive Director (began 10/2019)

Board of Directors
Martin Halbert, President (Dean of University Libraries, University of North Carolina at Greensboro)
David Seaman, Vice-President (Dean of Libraries and University Librarian, Syracuse University)
John Sherer, Treasurer (Spangler Family Director of the University of North Carolina Press)
Kathleen Fitzpatrick (Director of Digital Humanities and Professor of English, University of Michigan)
David Magellan Horth (Senior Fellow and Director of Innovation Venturing and Partnerships Americas, Center for Creative Leadership)
Loretta Parham (CEO and Library Director, Robert W. Woodruff Library of the Atlanta University Center)
Katherine Skinner (Executive Director, Educopia Institute)
Jennifer Vinopal (Associate Dean for Distinctive Collections and Digital Programs, The Ohio State University)
Accomplishments

164 Member institutions in 4 communities, representing 8 countries, and 5 continents

$650,000+ in awards and subcontracts for grant-funded research

56 Publications including 36 blog posts, 11 reports, 5 policies, 3 articles, and 1 directory

70 research partners involved with 15 Educopia-led research projects

176,000+ visitors to the Educopia and affiliated community websites

MetaArchive

300 collections from 80 member institutions in the MetaArchive network, totalling 16TB

43 organizations responded to the 2019 Census of Scholarly Communications Resources, providing details regarding their mission, vision, and scoping; technical development and design; administrative and financial scaffolding; community engagement activities; and governance models.
1 NDSA Innovation Award

to SPN for its leading approach to providing support and guidance to the digital preservation community

25 Community Cultivation sessions

assisting other organizations in their community building efforts

1.2 million sets of eyes

on Educopia and affiliated community Twitter accounts, including 1,286 new followers

13 Born Digital Workflow

consultations completed

14 member profiles

published, highlighting the efforts and accomplishments of our community members

13 staff members

building communities; facilitating research; and cultivating a stronger, healthier, more equitable information management field
Grounded in more than a decade of our work, the Field Guide provides advice and tools that help emerging and established communities understand, evaluate, and plan their own growth, change, and maturation.

In November 2018, Educopia released one of the most significant publications of our tenure: *Community Cultivation—A Field Guide* (CCFG).

Since its publication, the CCFG has become a keystone for our organization and a critical lens for our work with collaborative communities and research projects. On a near-daily basis, our team calls on the Field Guide for guidance as we work in tandem with members and partners to assess, manage, develop, and sustain community projects and programs.

In the following snapshots, we once again turn to the Field Guide to help us describe the unique constellation of factors that influenced the trajectory of Educopia’s affiliated communities and research projects in 2019. These snapshots speak to the many accomplishments of our partners, the deep dedication of the Educopia staff, and to our shared efforts to create—through care and intentional action—a stronger, healthier, more equitable information management field.
Using Community Cultivation—A Field Guide as their compass, the SPN community has been able to reach several critical milestones in the Validation Lifecycle Stage, including successfully refining its communication and administrative structures, establishing committees rules and processes, and formalizing its governance procedures.

In January 2019, the Software Preservation Network (SPN) launched a two-year seed funded effort to secure SPN as a sustainable, community-owned organization. As part of this process, institutions were asked to invest—not just financially, but also in a series of facilitated community cultivation sessions in which members would make key decisions regarding the form, function, and future of SPN. True to style, SPN’s volunteers-turned-members (along with several new individuals and institutions) rose to the occasion and dove headfirst into the work.

Within the Governance arena in particular, SPN’s Steering Committee made significant progress at an impressive pace. Taking a deep dive into available organizational data, the Steering Committee mapped working group and affiliated project activities to existing strategic goals, resulting in a revised set that is scoped, measurable, and actionable for the remainder of the two-year period.

Looking ahead to 2020, the community has formed two subcommittees aimed exclusively at exploring SPN’s growth potential and sustainability beyond the two-year seed funded period. The Research & Innovation subcommittee is hard at work articulating a framework for incubating new research ideas. The Executive & Membership subcommittee is equally busy evaluating member services, designing an operational budget, and determining the structure of future revenue streams for supporting SPN.

After a rewarding year marked by capacity and community building, SPN was the honored recipient of the National Digital Stewardship Alliance’s 2019 Organizational Innovation Award. The award celebrated the community’s many accomplishments, ending the year with this external exclamation point punctuating its success.
For the Library Publishing Coalition, opportunities have proliferated across committees, events, and research projects, all of which expanded in 2019 to encompass the community’s broadening energy and capacity.

In 2019, the Library Publishing Coalition launched a host of new initiatives. For example, the Professional Development Committee’s pilot Mentorship Program provided an opportunity for members to directly exchange knowledge and expertise. This program matched up early-career community members with more seasoned library publishers, and its 14 participants celebrated the program’s collaborative nature and its benefits for both the participating “mentors” and the “mentees.” They also had suggestions for its improvement as it moves beyond the pilot implementation, including that peer mentor pairs—based not on career stage but on needs and interests—would best serve the membership in this moment of transformation for the library publishing field. The Professional Development Committee has adopted this change, and 2020 will mark the formal launch of LPC’s new Peer Mentorship Program.

LPC’s events continue to grow, and the Library Publishing Forum, hosted at Simon Fraser University in Vancouver, visually illustrated that expansion through both its program and its attendance numbers. Nearly 300 participants engaged in more than 55 sessions on
topics ranging from standards building to technical development. Many of the sessions zoomed in on the explicitly “scholar-led” and “community-governed” intent of many library publishing initiatives, interrogating how and by whom these terms are used and defined.

Similarly, the LPC’s 2019 membership meeting—titled “What’s our end-game”—provided space to debate both the collective and divergent intentions embedded in terms like “community-led publishing.” These healthy and important conversations are required to support the LPC’s evolution; they enable newer and longstanding members alike to articulate what they mean by “library publishing” and what draws them into community with other “library publishers.”

As a community in the midst of the Acceleration Lifecycle Stage, the Library Publishing Coalition is intentionally approaching new conversations and new programs with elasticity and curiosity. Rather than rigidly pursuing a specific outcome, the community is experimenting, evaluating, and refining its own offerings in the context of the increased capacity and scaling up of operations that are hallmarks of this Lifecycle Stage.
After a series of intensive evaluations of its organizational and technical models in 2019, the MetaArchive community is collaboratively charting a new pathway forward to ensure the community’s continued relevance and viability more than 15 years after its founding.

When Community Cultivation—A Field Guide was published in late 2018, the MetaArchive Cooperative figured prominently as an example of a community entering the Transition Lifecycle Stage of maturation. Indeed, since early 2019 the MetaArchive community has undertaken a series of intensive evaluations of both its organizational model and its technical approaches to distributed digital preservation (DDP). MetaArchive has identified several critical junctures that it must navigate to move forward into the future as a relevant, viable, and sustainable network more than 15 years after its founding.

The MetaArchive Cooperative has chosen to take a participatory approach to charting its new pathway forward. This work is supported by the Changing for Continued Impact (CFCI) Series, a facilitated framework led by Educopia that engages MetaArchive members in a series of focused discussions and work sessions. This generative and co-creative process will continue through Spring 2020 leading up to the next Annual MetaArchive Membership Meeting.
Each CFCI session builds on the previous. MetaArchive members began this work by revisiting the community’s existing *Mission, Vision, and Values* and discussing what sets MetaArchive apart from other DDP endeavors. As part of this initial work, the members agreed that a distinctive feature of MetaArchive is its multiplicity of stakeholder types, spanning sector, field, discipline, and national boundaries. This intentional bridge building has also brought together less-resourced institutions (e.g., public libraries, small museums) to work alongside their more well-resourced peers (e.g., academic research libraries) and benefit from shared practices and solutions. These are features that the community will prioritize and maintain throughout the Transition process.

The CFCI process accompanies one of MetaArchive’s most ambitious member-driven, collaborative, research projects to-date—the *SuperNode Pilot Project*. Launched in 2018, the project boldly investigates how best to transform MetaArchive’s infrastructure in order to simplify integrations with its most under-resourced members. The members are seeking ways to reduce the requirement for smaller institutions to host technology for the network and make it easier for institutions with limited staffing to prepare collections for deposit into MetaArchive’s distributed network. The SuperNode research reached its final conclusions in 2019, revealing specific limitations to the current membership and cost model that impede scaling up. MetaArchive is now repositioning key components of its backbone infrastructure to accomplish the necessary changes that will enable it to thrive in the future.

The CFCI process marks the Cooperative’s commitment to actively exploring how a community-owned DDP solution expands and revives its relevancy and stabilizes its operations in a rapidly changing technological landscape. The process is harnessing the creativity and knowledge of the MetaArchive membership to chart and direct the work of Transition, with the ultimate goal of helping the community successfully navigate its own change process.
Educopia Research serves as a collaborative hub that energizes communities of players to work together for mutual benefit and maximum impact.

Educopia’s research activities are designed to support our strong belief that system-wide change can only be accomplished with system-wide leadership. We build networks of players across numerous boundaries, helping them to align their work to accomplish goals together and at scale.

The Coalition for Diversity and Inclusion in Scholarly Communications (C4DISC) approached Educopia in the spring of 2019 to facilitate its community Formation process. The Educopia Research team designed and facilitated a series of ten virtual convenings held over a six-month intensive work period, providing a structured process for C4DISC’s growth from an informal group of publishing associations into an organized community.

In working sessions, Educopia helped the group maintain its focus on the decisions and documentation most crucial in constructing a stable operational form. We began with the formalization of a “founders” group, a set of individuals who were empowered to explore options and make initial decisions about the form and function of the prospective community. We then guided the founders through a series of exercises that solidified C4DISC’s mission, vision, and goals. Finally, we provided scaffolding to help this group determine the organizational, governance, and business elements that would best
support and sustain its efforts over time. The founding representatives successfully completed this work in Fall 2019, and are launching the new community in 2020.

The Maintainers is a global research network interested in the concepts of maintenance, infrastructure, repair, and the myriad forms of labor and expertise that sustain our human-built world. Its founders approached Educopia for help in realizing their vision: an organization that would serve as a core resource and umbrella that supports multiple, topically focused maintainers communities, each of which assists a specific field of work, such as transportation, recycling, information, and workforce development.

With generous funding from the Alfred P. Sloan Foundation, Educopia supported the work of The Maintainers to establish this hub-and-spoke model. Together, we built a common core (Maintainers Central) that provides administrative, technical, and organizing support to numerous domain-specific “maintenance communities.” We also co-authored with this community-of-communities Maintenance Community Framework (forthcoming 2020), which will serve as a blueprint for organizing individual maintenance communities as part of the Maintainers network.

Open Source Software Archival Workflows (OSSArcFlow)—when the BitCurator Consortium surfaced a common concern regarding the invisibility of digital curation workflows, Educopia Research responded by helping the community to design and implement the internationally renowned OSSArcFlow project.

With generous support from the Institute of Museum and Library Services, the OSSArcFlow project team developed a method and framework for representing digital archiving workflows in order to better understand gaps, inefficiencies, similarities, and differences in the ways collecting institutions deploy open source software tools.

By mapping the workflows of twelve libraries, archives, and museums, the team has surfaced a range of technical and institutional drivers that lead institutions to choose different workflow approaches, even when they are all using the same group of open source tools. The team is now building guidance documentation and training modules to help other institutions to map their workflows using a common framework. This in turn will enable collecting institutions to better understand and address their shared needs, pain points, and challenges.
The BitCurator Consortium has grown into a burgeoning community of practice that fuses technical concerns with the broader field of born-digital archiving and the institutional and workflow needs of its members.

The BitCurator Consortium initially formed in 2014 around an Open Source Software environment that supports the acquisition and initial curation of born-digital collections in libraries, archives, and museums. It has grown into a burgeoning community of practice that fuses these technical concerns with the broader field of born-digital archiving and the institutional and workflow needs of its members. This community is completing its Validation Lifecycle Stage and is poised to enter Acceleration during 2020.

The administrative, governance, and engagement scaffolding that BCC has built over the last few years is already providing a strong foundation through which to meet the increasing born-digital archiving needs of collecting institutions. That became apparent in 2019, as the BCC experienced initial membership increases and the active spawning of new working groups and committees.

The BitCurator Users Forum, for instance, was the highest-attended annual meeting ever, and over a third of its attendees were non-members who were attracted to the work of the BCC. One session, in particular, was highly praised for allowing attendees to ask anonymous questions, both basic and advanced, and to hear not from a panel, but from the whole auditorium with crowdsourced answers and advice.

To handle the growth and change that both BCC and the broader digital curation field are experiencing, the BCC’s leadership is actively “skilling up” and building its capacity for planning and actualizing the community’s work. In preparation for the BCC’s forthcoming Acceleration work, Educopia is providing the community with advanced training in how to plan and manage the BCC’s budget and operating reserves, how to evaluate the success of committees and research projects, and how to calibrate a widening vision that encompasses not just the technical, but also the human and workflow components of born-digital archiving.
### 2019 Educopia Institute Profit & Loss Statement

#### Income

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<thead>
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<th>Sector</th>
<th>Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership</td>
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<tr>
<td>Events &amp; Programs</td>
<td>$ 171,782.98</td>
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<tr>
<td>Grants &amp; Consulting</td>
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<td>Investment</td>
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<td><strong>Total</strong></td>
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#### Expenses

<table>
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<tr>
<th>Sector</th>
<th>Expenses</th>
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<tbody>
<tr>
<td>Personnel</td>
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<td>Professional Services</td>
<td>$ 349,624.51</td>
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<td>Office &amp; General</td>
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<tr>
<td>Events &amp; Travel</td>
<td>$ 243,428.51</td>
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<tr>
<td><strong>Total</strong></td>
<td>$1,274,342.90</td>
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</tbody>
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### Income by Sector

- **BitCurator Consortium**: $70,525.96
- **Library Publishing Coalition**: $215,361.08
- **MetaArchive Cooperative**: $108,560.14
- **Educopia Research**: $926,161.70
- **Total Income**: $1,320,608.88