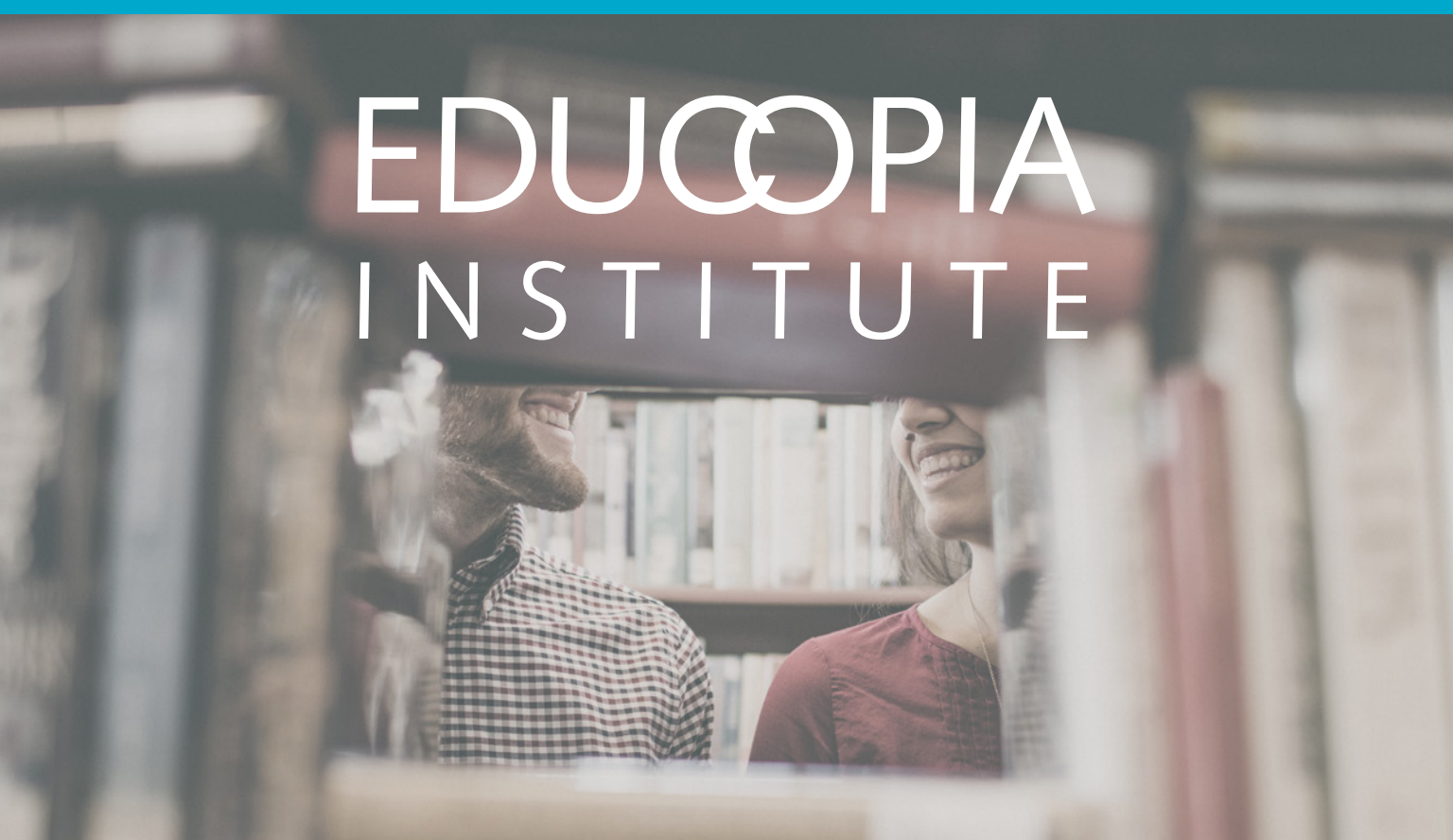# Spanning Boundaries, Engaging Communities

2016 Annual Report

EDUCOPIA
INSTITUTE

Message from the Executive Director

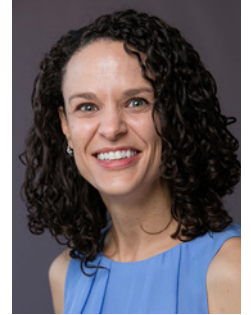**Educopia Institute targets the nexus points where multiple perspectives meet.**

Our mission is to build communities, connect people, and use collective action to advance the creation and dissemination of knowledge.

Our passion is to catalyze new types of action by building relationships between groups who need each other but don't yet know it.

In 2016, Educopia convened libraries, archives, museums, publishers, journalists, technologists, and government agencies. Spanning boundaries—public, private, academic, nonprofit—enabled us, collectively, to move the needle on some seriously tricky system-level challenges. "Wicked challenges," many like to call them.

Here, we share with you—our collaborators, partners, members, funders, and friends—a few snapshots of our year's work and accomplishments.

Here, we also offer our sincerest gratitude to all of you who make this work possible. Our second decade of work is off to a great start, and we look forward to continuing to work with you all to demonstrate the power of community.

Katherine Skinner, Executive Director

Photo by Jeremy Iwanga on Unsplash

Front cover photo (bottom) by Josh Felise on Unsplash

Our Work

The Educopia Institute advances cultural, scientific, and scholarly institutions by catalyzing networks and collaborative communities to leverage and advance expertise, infrastructure, and information.

5 Staff

Christina Drummond | Sarah Lippincott | Sam Meister | Katherine Skinner | Courtney Vukasinovic

3 Affiliated Communities

BitCurator CONSORTIUM

Library Publishing Coalition

Meta Archive cooperative

5 Research Projects

ETDplus | Nexus: Leading Across Boundaries | Mapping the Landscapes

Dodging the Memory Hole (subcontract) | Software Preservation Network (subcontract)

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Photo by Clem Onojeghuo on Unsplash

Snapshots

1. Cultivating Change Leadership

What do you get when you bring 35 museum, library, and archives associations together to work on leadership development?

Several leaps closer to transformational change!

Nexus LAB: Layers of Leadership across Libraries, Archives, and Museums
Key Roles and Challenges

Role specific skills are developed in each level. Common skills are also developed across all levels.

LAYER A: Leading Self	LAYER B: Leading Others	LAYER C: Leading the Department	LAYER D: Leading Multiple Departments	LAYER E: Leading the Organization	LAYER F: Leading the Profession
KEY ROLE: Pursue knowledge, assignments and responsibilities that expand leadership capabilities	**KEY ROLE:** Add value to position and organization with creative and transformative teamwork	**KEY ROLE:** Manage complex strategies and projects through cross-functional teams	**KEY ROLE:** Connect with broader internal and external systems	**KEY ROLE:** Envision and shape broader culture, organization and strategy	**KEY ROLE:** Help my profession constructively examine itself and evolve
CHALLENGE: "How do I navigate my organization in order to have impact, learn, and grow both technically and as a leader?"	**CHALLENGE:** "I'm good at doing my own work, but how do I get the work done through others?"	**CHALLENGE:** "How do I translate organizational culture and associated strategy into practical plans and objectives that my people can relate to and be measured on?"	**CHALLENGE:** "How might the collective performance of my departments be enhanced for the long term success of the overall organization?"	**CHALLENGE:** "How do I strengthen or transform my organization so it continues to be relevant and adds value to the communities we serve?"	**CHALLENGE:** "How do I make an impact on the growth, development, sustainability and reputation of my profession?"

EDUCOPIA INSTITUTE · Center for Creative Leadership · Institute of Museum and Library Services (This project was made possible in part by the Institute of Museum and Library Services (IMLS Award RE-00-15-0099-15)) · (CC) BY

In 2016, under the guidance of partner-led Task Forces, the "Nexus: Leading Across Boundaries (LAB)" project team developed a suite of curricular resources and evaluation tools to support leadership development at the professional level.

In June, more than 20 members of our project team gathered for an in-person retreat at the Center for Creative Leadership's (CCL) headquarters to engage in boundary-spanning leadership training and to plan to launch testing of these new, open resources.

Piloting of these new resources began across all of the library, archives, and museum fields and sectors in August. By December, more than 100 librarians, archivists, and museum staff members had been exposed to the training's system-level thinking skills and "change leadership" methodologies. Several additional training programs utilized the evaluation tools, which are designed to enable trainers to choose among an extensive range of leadership competencies, and thus are broadly applicable to leadership training beyond the curriculum designed in this project. These pilots will continue throughout 2017, and we will refine and release the curriculum materials and evaluation tools and frameworks broadly next Fall.

The relationships fostered between association leaders and trainers through this project are part of its magic. By modeling boundary-spanning collaborations and connections, we empower ourselves to address the system-level "wicked challenges" and paradoxes of "knowledge dissemination" today.

2. Catalyzing Cross-sector Engagement

If we preserve digital objects, shouldn't we also preserve the means by which we can experience them?

This question has fueled the work of more than 67 participants within the budding (and already thriving!) community of the Software Preservation Network (SPN).

SPN bridges many stakeholders— legal, public policy, social science, natural science, information and communication technology, and cultural heritage—all of whom create and use software and increasingly worry about its longevity and long-term availability.

Educopia's incubation work with SPN in 2016 provided its Governance Working Group with the initial scaffolding and training to facilitate the community-formation process. With training sessions on organizational modeling (e.g., landscape analysis, vision/mission/values creation, business planning, and funding models), we have begun to equip and "skill up" the community's volunteer leadership to make concrete organizational decisions and yield a stable operational form for SPN.

A crucial element of this phase of the project has been illuminating the range of work already underway in software preservation, both nationally and internationally. With these players and activities known, mapped, and increasingly aware of each other, SPN can begin helping these efforts to intentionally and strategically align going forward.

Snapshots (continued)

3. Mapping Training Gaps and Opportunities

Do libraries, archives, and museums share common development challenges and training needs?

Our "Mapping the Landscapes" effort, led by Educopia and driven by 37 professional and service associations across the library, museum, and archives fields, has answered this question with an emphatic "YES!" through data gathered in a cross-sector survey (2,788 respondents) and targeted focus groups (61 participants).

The nationwide survey we conducted across libraries, archives, and museums is the first of its kind. The results demonstrated strikingly similar confidence levels and areas of shared needs across librarians, archivists, and museum professionals. Given the richness of the data and the many questions that it can answer, the project team developed a series of dynamically filterable data visualizations (in Tableau Public) that allow curriculum designers, program administrators, and other stakeholders to independently query the data by filtering reports by state and field.

As a key project touchstone, the project team identified, analyzed, distilled, and ultimately mapped together eight existing competency frameworks that are currently in use across the three fields (libraries, archives, museums) and their many sub-fields and sectors (public, private, research, etc.). Through this work, we established a "Common Competency Taxonomy" that details six core competency areas, dozens of sub-areas, and 98 specific competencies.

The success of this effort is credited entirely to the volunteer actions of the many team members who helped to shape and form the project and instruments, distribute the survey, and communicate its findings. The results are now in use broadly across the fields by professional and service associations, trainers, and individual project teams as they design and implement new training offerings. The focus group, survey instruments, and methodology have been documented and packaged—making it easy to repeat this survey on a bi-annual basis and establish ongoing information about the needs of professionals both within and across the fields.

4. Moving from Research to Results

How can librarians share their deep professional knowledge to help prepare students to structure and care for their digital research outputs ?

Through partnering with graduate schools.

This is the premise of Educopia's 2014-2017 IMLS-funded ETD+ project, in which we are providing students with training that focuses on the research outputs they have to produce and submit for graduation: their Electronic Theses and Dissertations (ETDs). The project is producing guidance documentation and a six-module training curriculum that will be open and free to institutions to take, use, and modify at will.

Libraries increasingly report that graduate students do not attend library-hosted trainings unless they are required or encouraged to do so by their faculty or by their graduate school. In order to be successful, both in and beyond their graduate programs, students need to know how to structure, organize, and ensure the longevity of their digital content. These skills are known and practiced by information management professionals, yet most students are learning these skills either in *ad hoc* ways or not at all.

Our ETD+ project seeks to empower information management experts from libraries to partner with their graduate schools to address these essential skills in the context of dissertation/thesis preparation. In 2016, we released a set of six Guidance Briefs that are now being adopted and adapted by many libraries worldwide as a first step in this educational process.

Snapshots (continued)

5. Deepening Community Engagement

What does scholarly publishing look like when it's driven by librarians?

It's community-owned, driven by mission and values, and deeply innovative!

At nearly 70 institutional members, the [Library Publishing Coalition](#) (LPC) is Educopia's largest affiliated community, and it's growing steadily - both in numbers and in engagement. In 2016, it put out its most comprehensive Library Publishing Directory to date, and responded to a longstanding need for library publishing-related professional development by launching an IMLS-funded curriculum development project. In the last year, the LPC has also hosted knowledge-sharing activities that include conference "meet-ups," webinars, and roundtable discussions. It brought together more than 150 librarians, university press staff, and other scholarly communication professionals in Denton, Texas, for the third annual [Library Publishing Forum](#). At the forum, after a groundswell of interest in the role of library publishing in providing a platform for scholarship by underrepresented voices, the LPC responded with a plenary panel on the topic. A publication on the topic was also recognized with the organization's annual Award for Outstanding Scholarship in Library Publishing, setting the stage for more targeted work on diversity and inclusion in scholarly publishing in 2017.

6. Scaling Digital Preservation

If you have digital collections, but are not a research library, where can you turn for preservation help?

From its inception in 2004, the [MetaArchive Cooperative](#) has focused energy on bringing together research libraries with non-academic institutions, such as public libraries and small museums, to accomplish digital preservation. The MetaArchive community has always been enriched by incorporating diverse member types, and in 2016, we sought to expand our capacity for working with smaller, less resourced institutions.

Non-academic institutions face specific challenges when it comes to digital preservation. They are amassing increasingly large digital collections, but bandwidth constraints, technical staff/ resource limitations, and lack of funding make digital preservation difficult to achieve.

Building on previous experiments with small organizations to lower technical barriers, we launched a new membership option in 2016. Under this option, member institutions are not required to purchase or host a MetaArchive-LOCKSS server cache, but instead pay a modest technology fee into the Cooperative.

Also in 2016, the Ingest Pathway Working Group investigated and produced a set of recommendations towards establishing a simplified ingest process utilizing a Bagit-based approach, with a goal of making the ingest process easier, especially for smaller, less-resourced organizations. These efforts have now laid a strong foundation for the evolution of the MetaArchive technical infrastructure towards a supernode network model. While still in an exploratory stage, we hope the supernode network model will both simplify network operations by streamlining the overall quantity of storage nodes, and offer expanded options for organizations with limited resources to join and participate in the network.

Highlights in Brief

January

— 43 archivists, curators, and librarians attended the **2016 BitCurator Users Forum** at the University of North Carolina at Chapel Hill

— 14 students awarded scholarships for **"Dodging the Memory Hole 2016"** (hosted by Reynolds Journalism Institute/University of Missouri Libraries, UCLA, and Educopia)

February

— Facilitated the launch of a new cross-sector digital preservation collaborative, **IndiPres**

— Engaged with international thought leaders via a **Force 11 retreat** in Madrid, Spain

March

— Delivered a plenary about multi-stakeholder efforts in news preservation to an audience of journalists and publishers at the **"Collaborative Culture"** event at Reynolds Journalism Institute

April

— Facilitated the **San Antonio Preserving Government Information meeting**, bridging public, private, research, and other stakeholder communities

— Published the **"Preserving Electronic Government Information"** report

May

— Published the **ETDplus Guidance Briefs** for public review

— 160+ "pubrarians" attended the **Library Publishing Forum**

— Delivered a keynote on cross-sector coordination for the annual **American Association of Museums and Galleries conference**

June

— Hosted 22 representatives of library, archives, and museum leadership training programs in the **Nexus LAB retreat** at the Center for Creative Leadership

— Launched **Nexus LAB curriculum** pilot phase

July

— Delivered a keynote on collaborative cultures for the **Triangle Research Library Network**

— Began incubation work with **Software Preservation Network**

— **Mapping the Landscapes Interactive Survey Data Storyboards** released

August

— Cross-pollination meetup at **SAA** for BitCurator and MetaArchive

— First pilot of **Nexus LAB curriculum**

— **Nexus LAB evaluation** pilot phase begins

September

— **Nexus "Layers of Leadership"** release for public review

— Delivered invited plenary presentation on collaboration to **APTrust**

— Provided invited plenary presentation on community building to the **Council of Prairie and Pacific University Libraries** (COPPUL)

October

— Co-hosted **"Dodging the Memory Hole 2016"** with RJI/University of Missouri Libraries and UCLA

— Taught the **"Digital Preservation Outreach and Education"** workshop at the Library of Congress

— First pilot of **Nexus LAB evaluation**

November
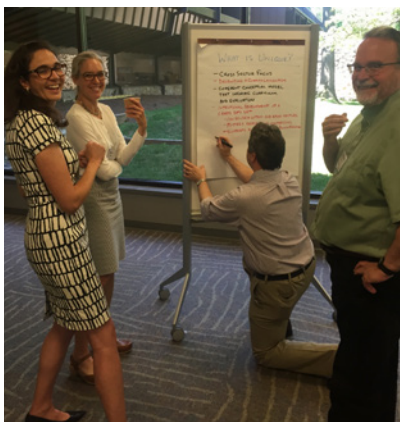
— Presentations, Mixers at **DLF/NDSA**

December

— Delivered invited plenary presentation at **ASERL annual meeting**

— **"Self-Identified LAM Professional Development Needs"** report issued

— LPC selects Charlotte Roh and Harrison Inefuku as the winners of the **2016 LPC Research Award** for their work, "Agents of Diversity and Social Justice: Librarians and Scholarly Communication"

Our Community and Partners

Educopia serves as a cross-sector community catalyst and neutral host site for the collaborative ventures of libraries, archives, and museums. Our staff facilitates the work of colleagues around the world to accomplish the goals set in our affiliated communities and research projects.

The wide range of partners with whom we work deserve the accolades for the projects we undertake together. We thank all of the following institutions for their crucial leadership, vision, and hard work in 2016.

BitCurator Consortium

British Library
Canadian Centre for Architecture
Cornell University
Duke University
Emory University
Gates Archive
Harvard University
McMaster University
MIT
New York Public Library
New York University
Northwestern University
Penn State University
Princeton University
Purdue University
Rockefeller Archive Center
Stanford University
Texas State Archives
UCLA
University of Colorado
University of Manchester
University of Maryland Libraries
University of Maryland, Maryland Institute for Technology in the Humanities
University of Melbourne Library, Research & Collections
University of North Carolina at Chapel Hill, School of Information and Library Science
University of Virginia
Yale University

Library Publishing Coalition

Australian National University
Boston College
Brigham Young University
California Digital Library
California Polytechnic State University
Carnegie Mellon University
Claremont Colleges
Colby College
Dartmouth College
DePaul University

Emory University
Florida State University
George Mason University
Grand Valley State University
Icahn School of Medicine at Mount Sinai
Illinois Wesleyan University
Indiana University
Indiana University-Purdue University Indianapolis
Iowa State University
James Madison University
Kansas State University
Lynn University
Macalester College
McGill University
Northeastern University
Northwestern University
Ohio State University
Oregon State University
Pacific University
Penn State University
Pepperdine University
Portland State University
Purdue University
Rutgers University
Simon Fraser University
State University of New York College of Environmental Science and Forestry
State University of New York at Geneseo
Syracuse University
Temple University
Texas Tech University
Tulane University
University College London
University of Arizona
University of Central Florida
University of Florida
University of Georgia
University of Illinois at Urbana-Champaign
University of Iowa
University of Kentucky
University of Maryland
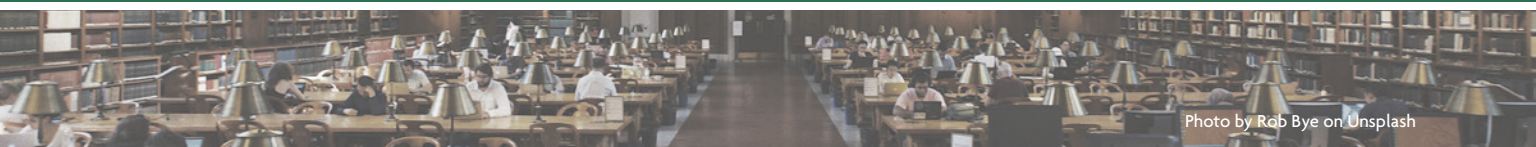University of Massachusetts Amherst

Achieving scale in areas like "digital preservation" and "scholarly communication" requires us to think broadly and inclusively about who our peers are and work together across boundaries of rank and size and shape and form.

University of Massachusetts Medical School
University of Miami
University of Michigan
University of Minnesota
University of New Brunswick
University of North Carolina at Charlotte
University of North Texas
University of Pittsburgh
University of Queensland
University of San Diego
University of South Florida
University of Tennessee, Knoxville
University of Utah
University of Washington
University of Windsor
Valparaiso University
Villanova University
Virginia Tech
Wake Forest University
Washington University in St. Louis
Wayne State University
West Virginia University

MetaArchive Cooperative

Boston College
California Polytechnic State University
Carnegie Mellon University
Consorci de Biblioteques Universitaries de Catalunya (CSUC)
Florida State University
Greene County Public Library
HBCU Library Alliance
Indiana State University

Oregon State University
Penn State University
Pontifícia Universidade Católica do Rio de Janeiro (PUC)
Purdue University
Rockefeller Archive Center
University of Louisville
University of North Texas
University of South Carolina
University of Tennessee
Virginia Tech
Williams College

Educopia Research

Academy of Certified Archivists (ACA)
ALA/SAA/AAM Committee on Archives, Libraries, and Museums (CALM)
American Association for State and Local History (AASLH)
American Institute for Conservation of Historic and Artistic Works (AIC)
Archives Leadership Institute (ALI)
American Library Association (ALA), Public Program Office
Association for Information Science and Technology (ASIS&T)
Association for Library Collections and Technical Services
Association of Academic Health Science Libraries (AAHSL)
Association of Academic Museums and Galleries (AAMG)
Association of American University Presses (AAUP)
Association of Children's Museums (ACM)

Association of College and Research Libraries (ACRL)
Association of Midwest Museums (AMM)
Association of Research Libraries (ARL)
Association of Science-Technology Centers (ASTC)
Association of Southeastern Research Libraries
Association of Zoos and Aquariums (AZA)
Bepress
BlueSky to BluePrint
Califa
California Polytechnic State University
Carnegie Mellon University
Center for Creative Leadership (CCL)
Chief Officers of State Library Agencies (COSLA)
Colorado State University
Confederation of Open Access Repositories (COAR)
Council of State Archivists (CoSA)
Council on Library and Information Resources (CLIR)
Digital Preservation Management Workshop
George Mason University Press and Mason Publishing Group
Getty Leadership Institute
Heritage Preservation
InfoPeople
Illinois State Library ILEAD U
Indiana State University
Institute for Cultural Entrepreneurship (ICE)
Internet Archive
Ithaka S+R

Photo by Sebastien Gabriel on Unsplash

Our Community and Partners (continued)

Educopia Research (continued)

Ivins eContent Solutions

Johns Hopkins Museum Studies Program

Library Information Technology Association

Library Leadership & Management Association (LLAMA)

LYRASIS

Maureen Sullivan Associates

Medical Library Association (MLA)

Midwest Archives Conference (MAC)

Mid-Atlantic Association of Museums (MAAM)

Mid-Atlantic Regional Archives Conference (MARAC)

Morehouse School of Medicine

Mountain-Plains Museums Association (MPMA)

NASIG

National Association for Interpretation (NAI)

National Association of Government Archives and Records Administrators (NAGARA)

National Library of Medicine (NLM)

New England Museum Association

New Media Consortium

North American Serials Interest Group (NASIG)

Northeast Document Conservation Center (NEDCC)

Online Computer Library Center (OCLC)

Oregon State University

Pacific University

Pennsylvania State University

ProQuest

Public Knowledge Project (PKP)

Public Library Association (PLA)

Purdue University

Regional Archival Associations Consortium (RAAC)

Reynolds Journalism Institute (RJI)

Simon Fraser University

Society of American Archivists (SAA)

Society for Scholarly Publishing (SSP)

Southeastern Museums Conference (SEMC)

St. Mary's College of Maryland

Stanford University Press

Syracuse University

Temple University Press

Toolkit Consulting

TrueBearing Consulting

University of California, Los Angeles (UCLA)

University of Florida

University of Illinois at Urbana-Champaign

University of Louisville

University of Massachusetts Amherst

University of Michigan

University of Missouri

University of North Carolina at Chapel Hill, School of Information and Library Science

University of North Texas (UNT)

University of South Florida

University of Tennessee, Knoxville

University of Texas at Austin

University of Wisconsin Press

University Press of Florida

Urban Libraries Council (ULC)

Valparaiso University

Virginia Association of Museums

Virginia Tech Libraries

Sponsors—2016 Library Publishing Forum

Altmetric

Bookmasters

EZID

MDPI

Society for Scholarly Publishing (SSP)

Scholastica

Ubiquity Press

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Courtney Vukasinovic, Administrative Coordinator

Erin Moore, LPC Intern

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Financials

2016 Educopia Institute Profit & Loss Statement (Unaudited)

Income

Membership	$ 275,706.51
Reimbursements	$ 60,000.00
Event and Program	$ 36,673.43
Consulting	$ 71,229.39
Grants and Contracts	$ 395,398.54
Investment	$ 166.53

Expense

Personnel	$ 371,343.08
Professional Services	$ 227,338.40
Office and General	$ 21,449.07
Overhead Allocation	$ 59,261.30
Events	$ 56,219.23
Travel	$ 48,853.69
Net	**$ 54,709.63**

Educopia 2016 income by program/project:

🟨	Consulting	$ 41,854.39
🟦	ETDplus	$ 95,860.32
🟦	Mapping the Landscape	$ 80,771.72
🟧	Nexus LAB	$ 209,910. 55
⬜	MetaArchive:	$ 90,440.11
🟩	BitCurator	$ 50,699.99
🟪	Library Publishing Coalition	$ 169,134.58

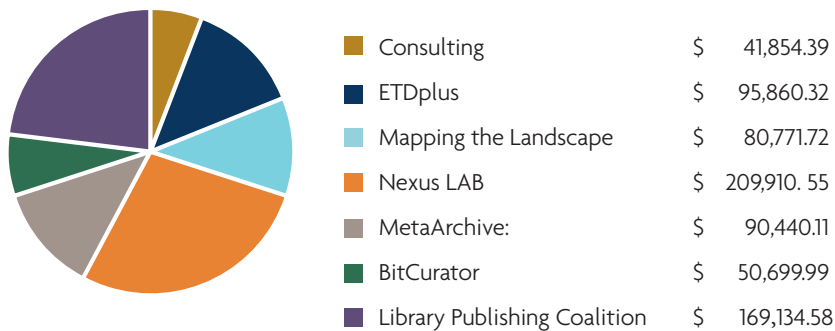

Photo by Tim Swann on Unsplash

Five staff. Three communities. Five research projects. Enormous reach.

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www.educopia.org