Open Source Software and Community Supported Software - Sustaining Together
Welcome & Goals
Agenda

• Lightning Panel Discussion 9-10; brief program overviews then questions
  
  • Robert Cartolano - Fedora
    • AVP for Digital Programs and Technology Services for Columbia University Libraries/Information Services
  
  • Chris Hoffman - CollectionSpace
    • Program Director, UC Berkeley’s Research Data Management Program
  
  • Mark Jordan - Islandora
    • Head of Library Systems, W.A.C. Bennett Library, Simon Fraser University
  
  • Carol Mandel - ArchivesSpace
    • Dean of the Division of Libraries, New York University

• Break 10-10:30

• Break out discussions 10:30-11:15

• Wrap Up 11:15-11:30
Break Out Discussions

1st round
- ArchivesSpace
- Fedora
- How to work with and evaluate RSPs
- What resources are necessary to implement OSS?
- How do I know OSS is right for me?
- Pop up

2nd round
- CollectionSpace
- Islandora
- How to convince IT people to participate at your institution?
- What are the risks/benefits to working with open source?
- What does it mean to be an organizational home? What do people expect, care about?
- What does it mean to be part of a community?
- Pop up
ArchivesSpace: Software and Community Of, By, and For Archivists

Presentation for LYRASIS and member SUMMIT

Carol A. Mandel
Dean, Division of Libraries, New York University
Chair, ArchivesSpace Governance Board
ArchivesSpace is an open-source, web application for managing archives information

- Core archival processing functions, e.g., accessioning, description, arrangement
- Collection management records, events, reports
- Generation of metadata in multiple standard formats
ArchivesSpace Chronology

2004  NYU and UCSD awarded grant to develop Archivist Toolkit (AT)

2006  AT 1.0 released; Archon released

2008  AT Ithaka sustainability study

2009  Began explorations of:
   • AT/Archon “harmonization”
   • Home organization model
   • Sustainability models
<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>Mellon grant to create ASPACE software and sustainability model</td>
</tr>
<tr>
<td>2012</td>
<td>Organizational home agreement with LYRASIS</td>
</tr>
<tr>
<td>2013</td>
<td>ASPACE 1.0 released and ASPACE membership community established</td>
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</table>
Challenges We Faced in Crafting the ASpace Model

- Archivists ≠ Developers
- Incentivizing engagement
- Many small archives have minimal resources
- Defining and finding an organizational home
ASpace Principles for Sustainability

• Of, by, and for the archival community

• Must serve the full range of archives (no lone-arranger left behind)

• Must be affordable to full range of archives, including the smallest

• Users should be community members – community too small to support “free-riders,” and **engagement is key**
ASpace Strategies for Sustainability

- Centralized development capacity along with member software contributions
- Deep member engagement in priorities and mutual support, e.g., User Advisory Council, Technical Advisory Council, Users Group listserv
- Access to documentation, training, and support advice
- Stratified membership dues ranging from $7,500 for largest to $300 for smallest
- Governance Board and staff focus on user needs to guide resource allocation
- Fulsome support from organizational home
### Overview of Membership

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very large</td>
<td>46</td>
</tr>
<tr>
<td>Large</td>
<td>34</td>
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<tr>
<td>Medium</td>
<td>58</td>
</tr>
<tr>
<td>Small</td>
<td>54</td>
</tr>
<tr>
<td>Very small</td>
<td>113</td>
</tr>
<tr>
<td>Educational</td>
<td>10</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>315</strong></td>
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</table>

Note: Began in 2013 with 49 charter members
ASpace Now

Our success: We have created an active, engaged community with sufficient resources to continue development and support wide use.

Our challenge: Robust, satisfying, effective continuing development for our community of users.
CollectionSpace
Open source collection management system for museums

Chris Hoffman
UC Berkeley (Research Information Technologies)
Outline

1. CollectionSpace: History and Background
   a. Motivations and goals
   b. CollectionSpace at UC Berkeley
   c. The CollectionSpace community

2. From project to product while remaining a community
   a. The LYRASIS organizational home
   b. Governance and community
   c. Development
   d. Funding and resources

3. Next steps and challenges
What is a museum collection management system?
• Open source, web-based technical platform for collections information management in use at over twenty-five organizations

• Current focus on building long-term sustainability

• Community-source governance enables resource sharing at the institution, domain, or regional level

• Supports system extension and connection with applications that are essential for researchers and public access via APIs, custom web-apps, and more - all of which enable the mobilization of collections for aggregation and sharing

• Domain-specific profiles allow for use of CollectionSpace with minimal configuration across disparate domains such as art, material culture, and the natural sciences
- **Context (2008)**
  - 12+ campus museums and collections, using 6+ collections management systems, failing to meet new needs
  - Long history of collaboration between IT and museums.

- **Campus goals**
  - Drive down costs of managing individual collections
  - Use systems that are stable, secure, protect data, and are professionally managed
  - Facilitate innovations in research, teaching, and public service
  - Leverage investment across institutions and research grants
<table>
<thead>
<tr>
<th>Objects</th>
<th>Images</th>
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<tbody>
<tr>
<td>515,555</td>
<td>236,410</td>
</tr>
<tr>
<td>706,946</td>
<td>361,758*</td>
</tr>
<tr>
<td>52,374</td>
<td>290</td>
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<tr>
<td>56,592</td>
<td>136,655</td>
</tr>
<tr>
<td>22,344</td>
<td>9,147**</td>
</tr>
</tbody>
</table>

NB: Counts as of 4/1/2016

* Not including 418,582 catalog card images and "not-for-public" images

** Approx. number in rapid flux
Portals: Public, Internal (museum staff), and media-only
Web applications: Inventory, bulk update, media upload
... while remaining committed to:

• The CollectionSpace community and museums generally

• Principles of open source software
• Trusted name - LYRASIS provides organizational home support for the application and program team

• Commitment - member-based Board supporting Technical and Functional Working Groups

• Brand building, promotion and awareness - via conferences, webinars, social media and networking

• Fiscal stewardship - full time attention to detail

• End-to-end thinking - implementation, migration, and service provider support throughout adoption and implementation lifecycle

• Identify and facilitate the creation of strategic partnerships with consortia, universities, and arts organizations

• Funding - Grant writing and grant making (Mellon, Kress, NEH, mini-grants)
From project to product

• Governance and community
  • Three Working Groups: Leadership, Functional and Technical
  • Community outreach – within LYRASIS and by partners

• Development
  • At LYRASIS
  • At UC Berkeley and other community members

• Funding and resources
  • At LYRASIS
  • At UC Berkeley and other community members
Next steps and challenges

- Growing our membership and the community of museums and collecting institutions using CollectionSpace
  - Deciding where to focus
- Addressing technical challenges
  - Rewriting the user interface (to attract more developers and simplify the stack)
  - Simplifying installation, configuration and data migration
  - Hosting and service providers
- Leveraging the power and potential of museum collections
  - Addressing the strategic goals of museums and our broader community
  - Content sharing and integration in support of research, teaching and learning, and public service
Thank you for listening!

- Chris Hoffman
- Research Information Technologies, UC Berkeley
- chris.hoffman@berkeley.edu
Islandora

Mark Jordan – Simon Fraser University
LYRASIS Member Summit
October 18, 2016

Mark Jordan
Simon Fraser University Library
Overview

- Islandora is an open-source repository platform
- Integrates Drupal, Fedora Commons, Solr, lots of other components
- Functionality is provided by Islandora-specific “solution packs” and other modules
  - Core modules
  - Community modules
Overview

- Started in 2006 at University of Prince Edward Island
- First production site in 2007
- First commercial service provider founded in 2010
- Current major version (7.x) released March 2013
- Islandora Foundation formed July 2013
  - Hired its second fulltime employee in August 2016
- Next major version (8.x / CLAW) started 2015 and currently under development
The community

- 150+ installations in North America, South America, Europe, and elsewhere
- General email list has 873 members
- iCamps and conferences
- Last 5 releases (starting with Islandora 7.x-1.3) have been “community releases”
- Over 40 people have actively participated in each recent community release
Governance:
Islandora Foundation

- Islandora Foundation Board
  - Legal, financial, strategic matters
  - Two employees: Community and Project Manager, and Tech Lead
- Roadmap Committee
  - Operational governing committee for many of the Foundation's activities
- Committers' Group
  - Code stewardship and development protocols
- Interest Groups
  - Ad hoc, self forming, but with terms of reference
Collaborators and members

- American Philosophical Society
- Common Media
- Delft University
- Florida State University
- Florida Virtual Campus
- Marmot Library Network
- Metropolitan New York Library Council
- University of Connecticut
- Agile Humanities
- Andrews University
- Berklee College of Music
- British Columbia Electronic Library Network
- Chinese University of Hong Kong
- California Institute of Technology
- PALS
- Smithsonian Institution
Development

- Open community
  - New developers are welcome, all modules welcome
  - Tech Lead coordinates community activity, especially during releases
- Well proven development workflows
- Relies on Github and DuraSpace's issue tracker and wiki extensively
- Contributor Licence Agreements for core modules
- Close ties with the Fedora Repository community
Funding and resourcing

- Mainly membership funded
  - Partner: $10,000
  - Collaborator: $4,000
  - Member: $2,000
  - Individual: up to $250
- Camps and conferences
- Revenue of less than $200,000 Canadian
- Volunteer resources
  - Developers
  - Support community
  - Committee and group members
Risks and decisions

- Engaged and active community
- Sustainable funding and governance
- Moving the platform forward without leaving the community behind
- Healthy service providers
- Ties with allied communities
Fedora
Open Source Durable Object Repository

• Robert Cartolano
• Columbia University Libraries
• October 18, 2016
What is Fedora?

- Modular, open source repository system for the management and dissemination of digital content.
- Worldwide installed base that includes academic and cultural heritage organizations, universities, research institutions, university libraries, national libraries and government agencies.
- Supported by two full-time staff members
- Managed by DuraSpace

http://fedorarepository.org
Fedora Members Over Time

<table>
<thead>
<tr>
<th>Membership Year</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>40</td>
</tr>
<tr>
<td>2014</td>
<td>60</td>
</tr>
<tr>
<td>2015</td>
<td>70</td>
</tr>
<tr>
<td>2016</td>
<td>70</td>
</tr>
</tbody>
</table>
Fedora Funding Over Time

- 2010: $150,000
- 2011: $150,000
- 2012: $150,000
- 2013: $300,000
- 2014: $450,000
- 2015: $600,000
- 2016: $600,000
Fedora Governance Model

**Steering Group**
Oversees project operations, provides strategic guidance

**Leadership Group**
Approves priorities and strategic direction

**Project Members**
Submit requests, requirements, recommendations, feedback and other input

**Working Groups**
- Working Group 1
- Working Group 2
- Working Group 3

**Technology Team**
- Committers

**DuraSpace Organization**
- Product Manager
- Tech Lead
Fedora Governance

- DuraSpace Board of Directors
- Fedora Steering Group
- Fedora Leadership Group
- Fedora Committers

http://fedorarepository.org/governance
Development - Fedora Committers

Ben Armintor, Columbia University
Chris Beer, Stanford University
Aaron Birkland, Johns Hopkins University
Aaron Coburn, Amherst College
Esmé Cowles, Princeton University
Osman Din, Yale University
Mike Durbin, University of Virginia
Nick Ruest, York University
Adam Soroka, University of Virginia
Jared Whiklo, University of Manitoba
Andrew Woods, DuraSpace

https://wiki.duraspace.org/display/FF/Fedora+Committers
Fedora Workshops

Hosted throughout the year at conferences and events

3-day Fedora Camps are also available

Next Fedora Camp in NYC in November

Plans for a Fedora Camp in the UK in 2017
Useful Links

Fedora Main Site:
• http://fedorarepository.org

Fedora Wiki
• https://wiki.duraspace.org/display/FF

Many Thanks to David Wilcox, Fedora Product Manager for his slides:
• dwilcoxduraspace.org