



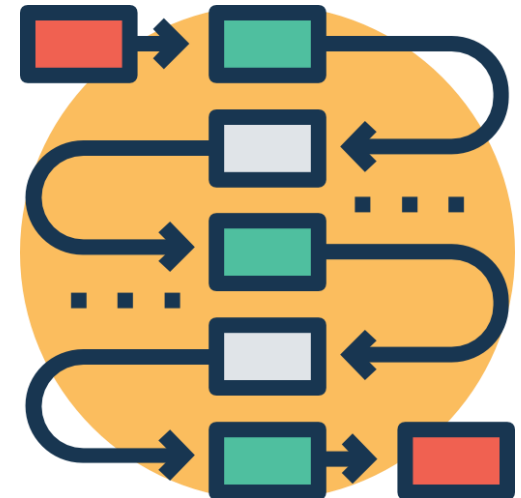
Testing the Model: Assessing Fedora with ITAV

David Wilcox
Product Manager, DuraSpace Community Supported
Programs

- Gather information about Fedora in a common, comparable format
- Establish a common framework and vocabulary around programs in the division
- Enable strategic discussions for assessed programs, leading to clearer priorities



- Complete assessment instrument
 - ~3 hours with 2 project staff
- Complete peer review
 - ~3 hours with 1 project staff and peer interviewer



- Core data sections are straightforward
- Group planning exercises are potentially time consuming
- Many questions are qualitative; answers will be difficult to normalize for comparison purposes
- Peer assessment was productive



- Good opportunity for relatively objective program evaluation
- Assessment is thorough; encourages exploration of topics not commonly discussed
- Provides a snapshot of program health
- Leads to areas of further exploration



- Limit group planning exercises to a subset of the brainstormed ideas
- Revisit qualitative questions to see if they can be made more quantitative for comparison purposes
- Establish guidelines around time spent on each section



- Complete assessments for other programs
- Establish metrics for comparison
- Develop dashboards to report on project health
- Discover opportunities for collaboration between programs





Email **david.wilcox@lyrasis.org**

David Wilcox
Product Manager, DuraSpace Community Supported
Programs

ITAV Lessons with Fulcrum and Beyond...

Nabeela Jaffer

Program Manager for Strategic Projects
Library IT

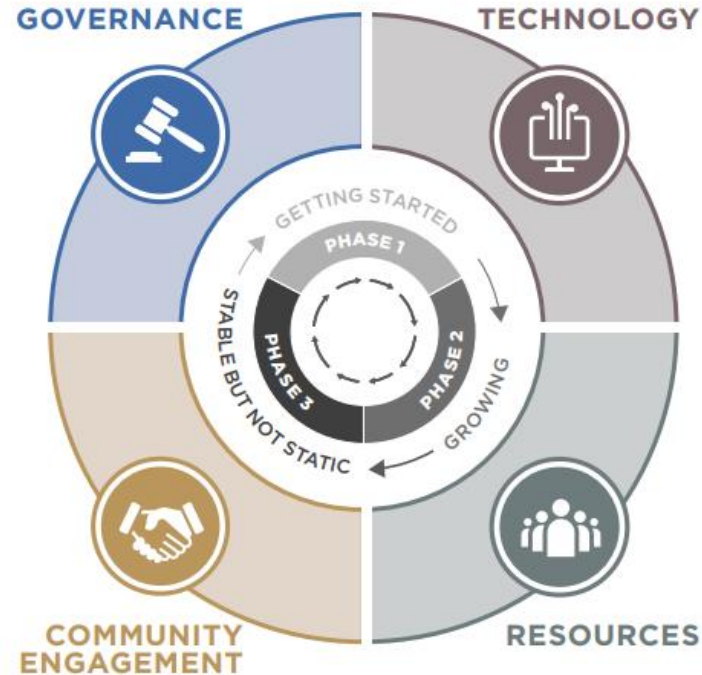


Infrastructure and services for mission-driven publishers

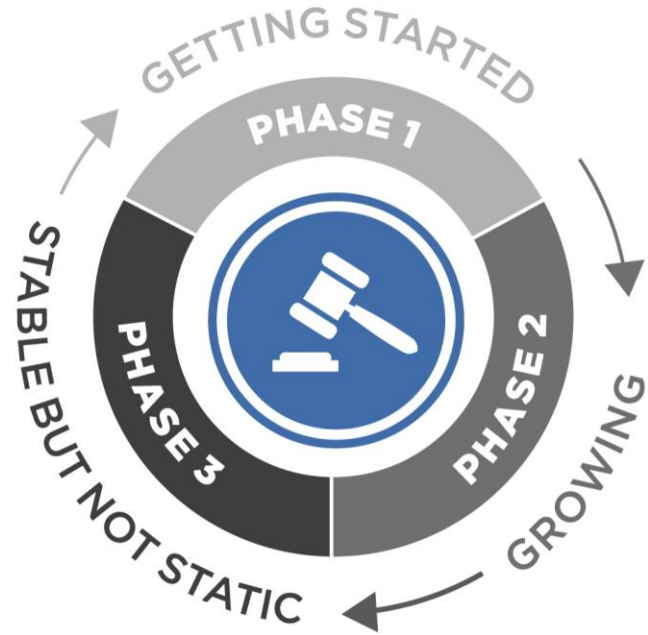
Fulcrum is a community-based, open source publishing platform that helps publishers present the full richness of their authors' research outputs in a durable, discoverable, accessible and flexible form.

GET UPDATES

Fulcrum ITAV workshop: ITAV Facets and Phases



Scores between 0-3 will align most closely with Phase I, between 4-7 with Phase II, and 8-10 with Phase III.





Beyond Fulcrum...

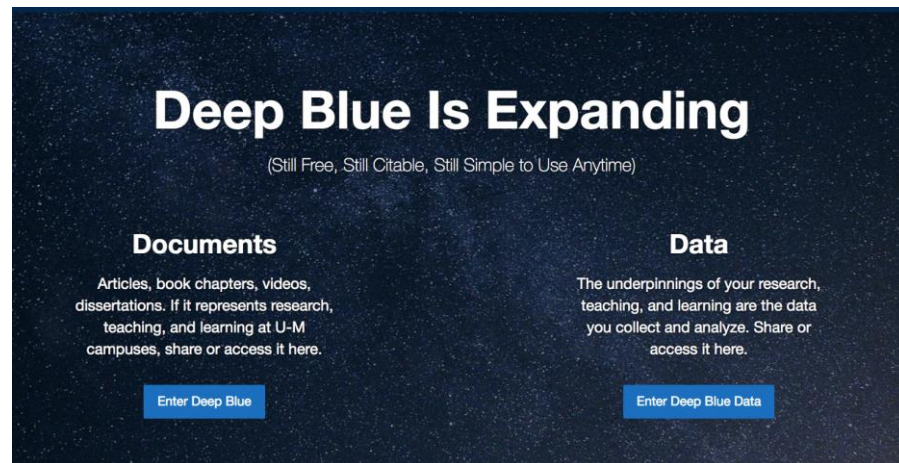
ITaV workshop for Deep Blue

Deep Blue Docs: Institutional Repository on DSpace

Deep Blue Data: Data Repository on Hyrax

Working towards...

Deep Blue: Docs + Data on one platform

A graphic with a dark blue, starry background. At the top, the text "Deep Blue Is Expanding" is written in a large, white, sans-serif font. Below it, in a smaller white font, is the tagline "(Still Free, Still Citable, Still Simple to Use Anytime)". The graphic is divided into two columns. The left column is headed "Documents" in white. Below the heading, it says "Articles, book chapters, videos, dissertations. If it represents research, teaching, and learning at U-M campuses, share or access it here." At the bottom of this column is a blue button with the text "Enter Deep Blue" in white. The right column is headed "Data" in white. Below the heading, it says "The underpinnings of your research, teaching, and learning are the data you collect and analyze. Share or access it here." At the bottom of this column is a blue button with the text "Enter Deep Blue Data" in white.

Deep Blue Is Expanding

(Still Free, Still Citable, Still Simple to Use Anytime)

Documents

Articles, book chapters, videos, dissertations. If it represents research, teaching, and learning at U-M campuses, share or access it here.

[Enter Deep Blue](#)

Data

The underpinnings of your research, teaching, and learning are the data you collect and analyze. Share or access it here.

[Enter Deep Blue Data](#)

Governance

Fulcrum

- First grant period vs. now
- Tactical vs Strategic decision making
- Technical Roadmap decision making
- Role of a product owner - Governance to prioritize development in accordance with values, other?

Deep Blue

- Illustrated the need for Clear articulation of strategy and governance (tech strategy and overall)
- Future combined service model governance would be informed by the current and challenges of the combined service policies and owners

Technology

Fulcrum

- Consider Tech roadmap or priority map?
- What does it mean once communicated? Can be used to set expectations and show future intentions
- Reactive vs proactive prioritization on the technology roadmap
- Empower engineers to say no, articulate need to pay down architectural debt

Deep Blue

- Concern: sustainability of open source code updates
- Aligning our roadmap with the open-source software community roadmap
- Need for a combined technology roadmap - strategic and prioritized
- Integrating with other library services

Community Engagement

Fulcrum	Deep Blue
<ul style="list-style-type: none">• What is the process by which the tech roadmap is set; how will Fulcrum communicate out?• For each set of stakeholders: why do we want to engage with them, how do we currently engage with them, how would we like to engage with them, what's the current gap?	<ul style="list-style-type: none">• Samvera engagement plan<ul style="list-style-type: none">○ We are engaged with the community on several fronts.○ Review our current community engagements and make a plan to be actively engaged with the aspects of the community that would benefit our strategic projects

Resources

Fulcrum	Deep Blue
<ul style="list-style-type: none">• U of Michigan contributions (small, stable, try to diversify); formalize commitment from university and library for ongoing operating support• Push back against “nonprofit starvation” – articulate need for resources to not just exist but to innovate	<ul style="list-style-type: none">• Deep Blue has a pool of assigned resources• How does it connect with community engagement/working on community code/contributing code back to the core

General Observations: Fulcrum and Deep Blue

- Helpful to have the whole team in the room to go through the workshop
- It was valuable to take a view of sustainability beyond just "where is the money coming from"
- Interesting to see how can we get away from one person making decision without getting too bogged down into group details
- Fulcrum's place in the broader community - leading to the understanding that while we were not community-governed we could be a good actor in terms of giving back to the open source code on which Fulcrum relies.

General Observations: Fulcrum and Deep Blue

- People who are closer to the facet had more critical response
- Suggestion: It would be helpful to review the 4 facets and answer the questions
 - What do we have confidence in? (similar to the number rating with in-depth convo)
 - What are the things we feel needs improvement?
 - Who has the confidence? Why?



CSS Sustainability and Beyond: a Wider Perspective

LYRASIS Member Summit, 2019

- Megan Forbes
 - ITAV Co-Director
- David Wilcox
 - DuraSpace Community Supported Product Manager
- Nabeela Jaffer
 - Program Manager for Strategic Projects, University of Michigan
- Lori Goldstein
 - Manager, Public Art Archive, WESTAF
- Jason Ronallo
 - Head of Digital Library Initiatives, NCSU Libraries



It Takes a Village: A Sustainability Framework

Megan Forbes – LYRASIS, Program Manager, CollectionSpace
Co-Director, It Takes a Village

www.lyrasis.org/itav

- OSS Programs serving cultural and scientific heritage suffer from a lack of resources devoted to sustainability planning
- IMLS funded the It Takes a Village project in 2017
- Intended grant outcomes:
 - Survey, forum, and roadmap
 - Increased awareness of OSS sustainability requirements, variety of models, and factors that influence sustainability
 - Opportunities for join projects and collaborations

ITAV Background - Who

LYRasis Co Directors

- Laurie Gemmill Arp
 - Director, CSCSS
- Megan Forbes
 - Program Manager, CollectionSpace

Advisory Group

- Rob Cartolano
 - Associate VP for Technology & Preservation - Columbia Libraries
- Tom Cramer
 - Assistant UL and Director, Digital Library Systems & Services - Stanford University
- Michele Kimpton
 - Director of Business Development, Senior Strategist - DPLA
- Katherine Skinner
 - Executive Director - Educopia Institute
- Ann Baird Whiteside
 - Librarian/Asst Dean for IS - Harvard Grad School of Design

Leaders and Participants





ArchivesSpace
a community served by LYRISIS

avalon
MEDIA SYSTEM

BitCurator



blacklight

catalyst


a community served by LYRISIS

CA COLLECTIVE
ACCESS

 **COLUMBIA UNIVERSITY**
IN THE CITY OF NEW YORK

CORAL

 **ConservationSpace**




DSpace

 **DURASPACE**

EDUCOPIA
INSTITUTE

Leaders and Participants



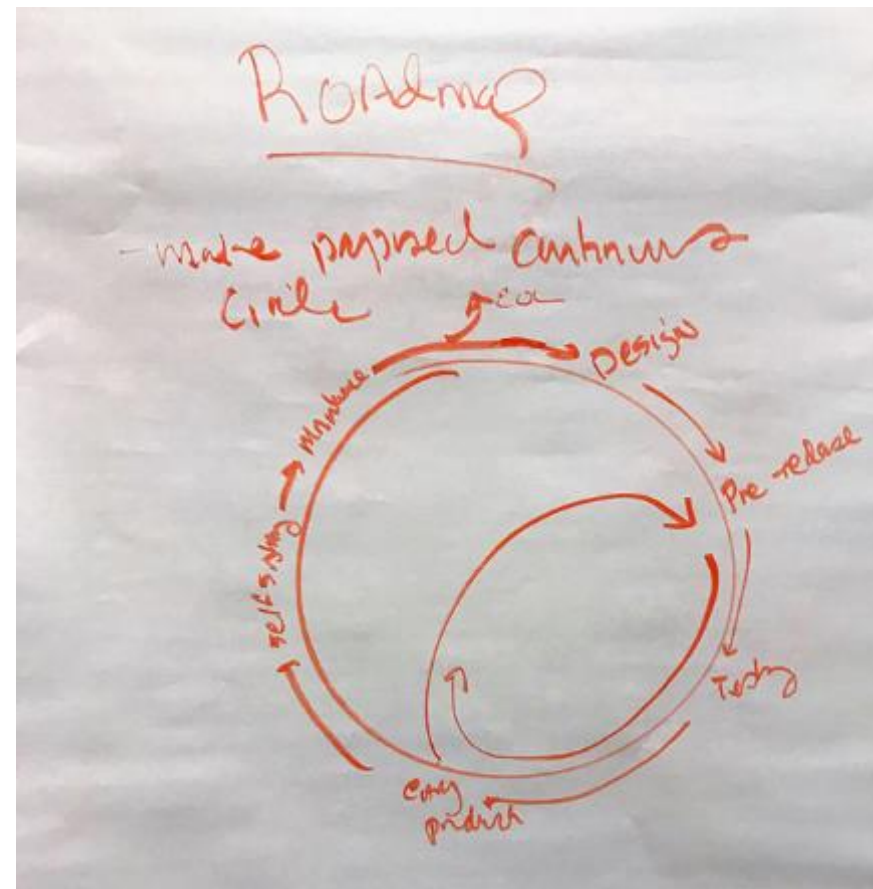
Fedora™



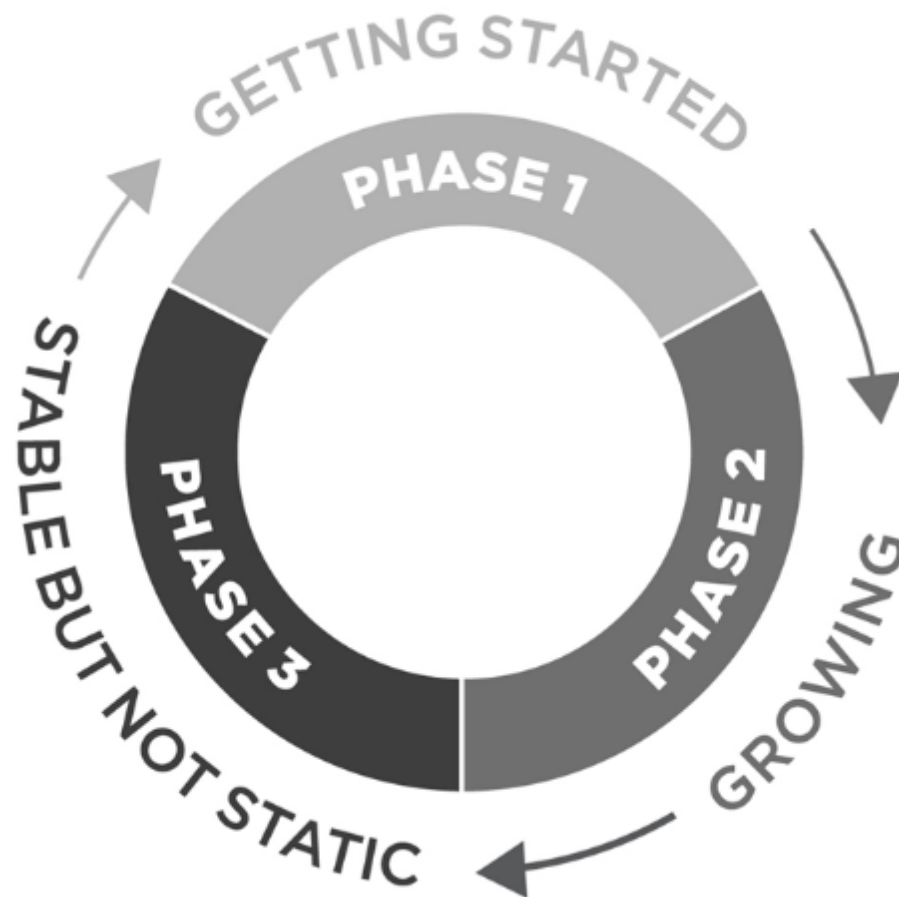
Harvard University
Graduate School of Design



- Sustainable programs grow from community needs
- Sustainability is not one thing, nor is it a straight line
- Sustainability has *facets* that move in cyclical *phases* - together and separately
- Gathered info from survey and forum to develop Guidebook to serve as practical reference source for OSS programs



- Getting Started
 - Early stages of planning, design and development
- Growing
 - Broadest, critical time to transition to sustainable
- Stable, but not Static
 - Reflects more mature program; beware complacency



ITAV: Facets

GOVERNANCE

Establishing
roles and
processes; how
decisions get
made



TECHNOLOGY

Software
development and
challenges that
impact the
development
process



Efforts to foster
involvement
w/in a
community;
users →
stakeholders



COMMUNITY ENGAGEMENT

RESOURCES

Human and
financial
resources in
variety of
forms



- Development of a structured series of tools – *ITAV in Practice* – to guide users through the assessment and planning process, and:
 - Enable all stakeholders in an OSS program to participate in assessment of each facet of sustainability at current and desired phases;
 - Develop balanced strategies to advance sustainability goals; and
 - Integrate sustainability plans into other organizational planning initiatives and documents.

Who better to experiment on than ourselves?



Objectives

- Gather information about programs in the division in a common, comparable format
- Further using a common framework and vocabulary
- Further our team building and knowledge sharing initiatives
- Fuel strategy discussions for the programs assessed



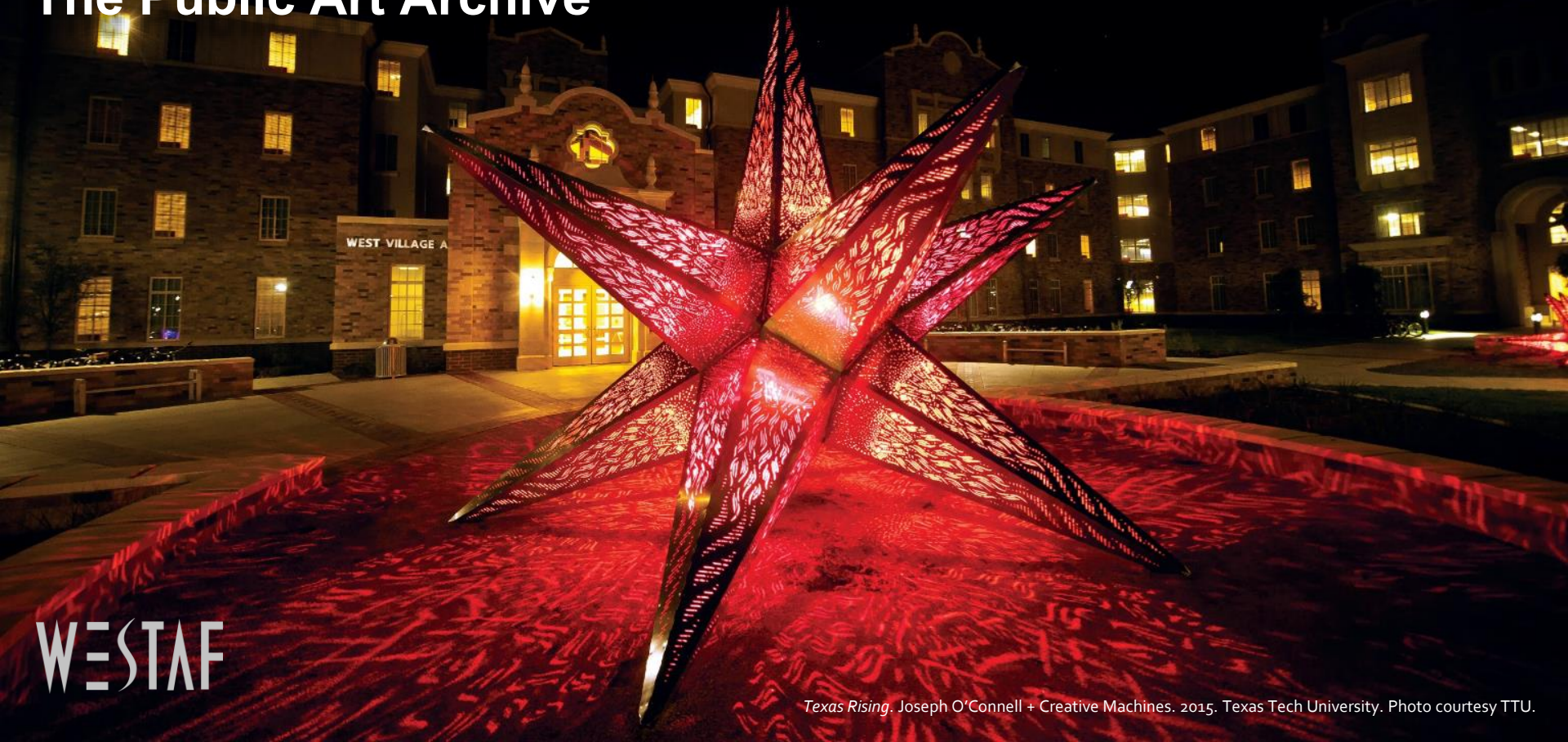
The Construction of the Tower of Babel, Unknown, illuminator
Rudolf von Ems, author (Austrian, about 1200 - 1254)
Image courtesy J. Paul Getty Museum.

- Community Assessment
 - Identify the stakeholders who make up the community and create a high-level map of their characteristics.
- Core Data (per facet)
- Peer Interview (per facet)
- What's Your Phase? (per facet)
- Wrap Up
 - Outline findings – objectives, trends, insights, and actions



[Nadar with Marie Eugène Chevreul on his Hundredth Birthday],
Nadar [Gaspard Félix Tournachon], (French, 1820 - 1910).
Image courtesy J. Paul Getty Museum.

Approaching Sustainability: The Public Art Archive™



WESTAF

Texas Rising. Joseph O'Connell + Creative Machines. 2015. Texas Tech University. Photo courtesy TTU.

WESTAF

Through innovative programming, advocacy, research, technology, & grantmaking, WESTAF encourages the creative advancement & preservation of the arts regionally & through a national network of customers and alliances.

Earned Income Products



PUBLIC ART
ARCHIVE



Non-Profit Art Services

- Multicultural initiatives
 - Training
 - Consulting
- Convenings
 - Cultural Policy Symposia
- Grants
 - TourWest
- Policy
- Advocacy

What is the Public Art Archive™ (PAA) Today?

- **Database**
 - searchable online repository of public art throughout the world accessible on desktop computers and mobile devices
- **Collection Management System**
 - built on the CollectionSpace public art profile to manage the public art workflow from commissioning through conservation
- **Suite of technology-driven tools**
 - provide online platforms for sustained engagement with public art

Search & Explore

Artist

▼ Type in term to begin your search

Search

Browse the contents of the Public Art Archive using the buttons below

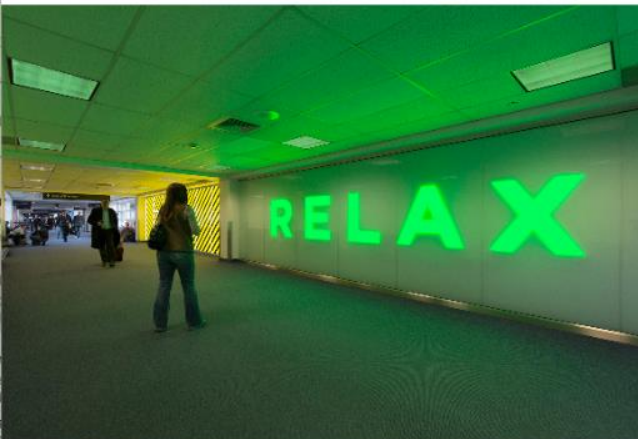
Artist

Collection

Material

Worktype

Location



RELAX. Electroland LLC. 2013. Denver International Airport & Denver Arts & Venues: Public Art Program Collections. Photo courtesy Electroland LLC.



I See you WeHo. Miguel Andres Andrisani. City of West Hollywood Collection. Photo courtesy Miguel Andres Andrisani.

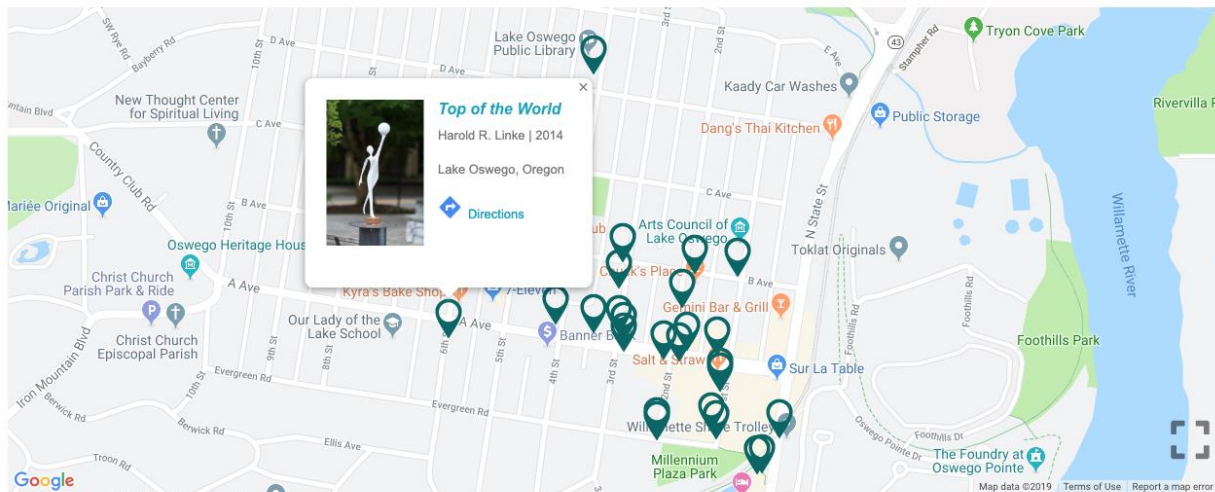


Other Side of the World. Ball-Nogues Studio. 2018. Greater Pittsburgh Arts Council Office of Public Art. Photo courtesy Linus Gruzewski.



Gallery Without Walls is a unique outdoor sculpture exhibit, containing eighty permanent and loaned works of art. The exhibition is open year-round, and is free for everyone to enjoy. Our downtown rotating exhibition features approximately thirty sculptures on-loan from artists for a period of two years, all of which are available for purchase. All other artwork in the Gallery Without Walls belongs to the City of Lake Oswego's permanent art collection.

Gallery Without Walls is administered by the Arts Council of Lake Oswego, a nonprofit 501(c)3 arts organization. The Arts Council's mission is to ensure the arts are an integral part of life in Lake Oswego, and we work in partnership with City agencies, local businesses, and community members to bring sculptures to our streets.



[LOCATE ART NEAR YOU →](#)

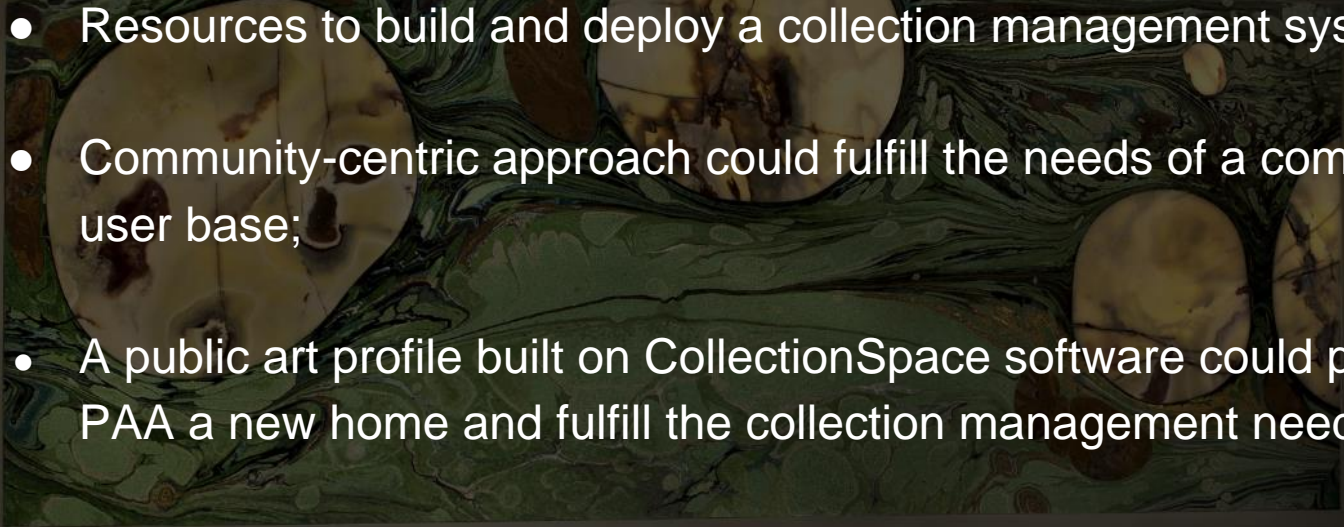
[LEARN MORE ABOUT ACLO →](#)

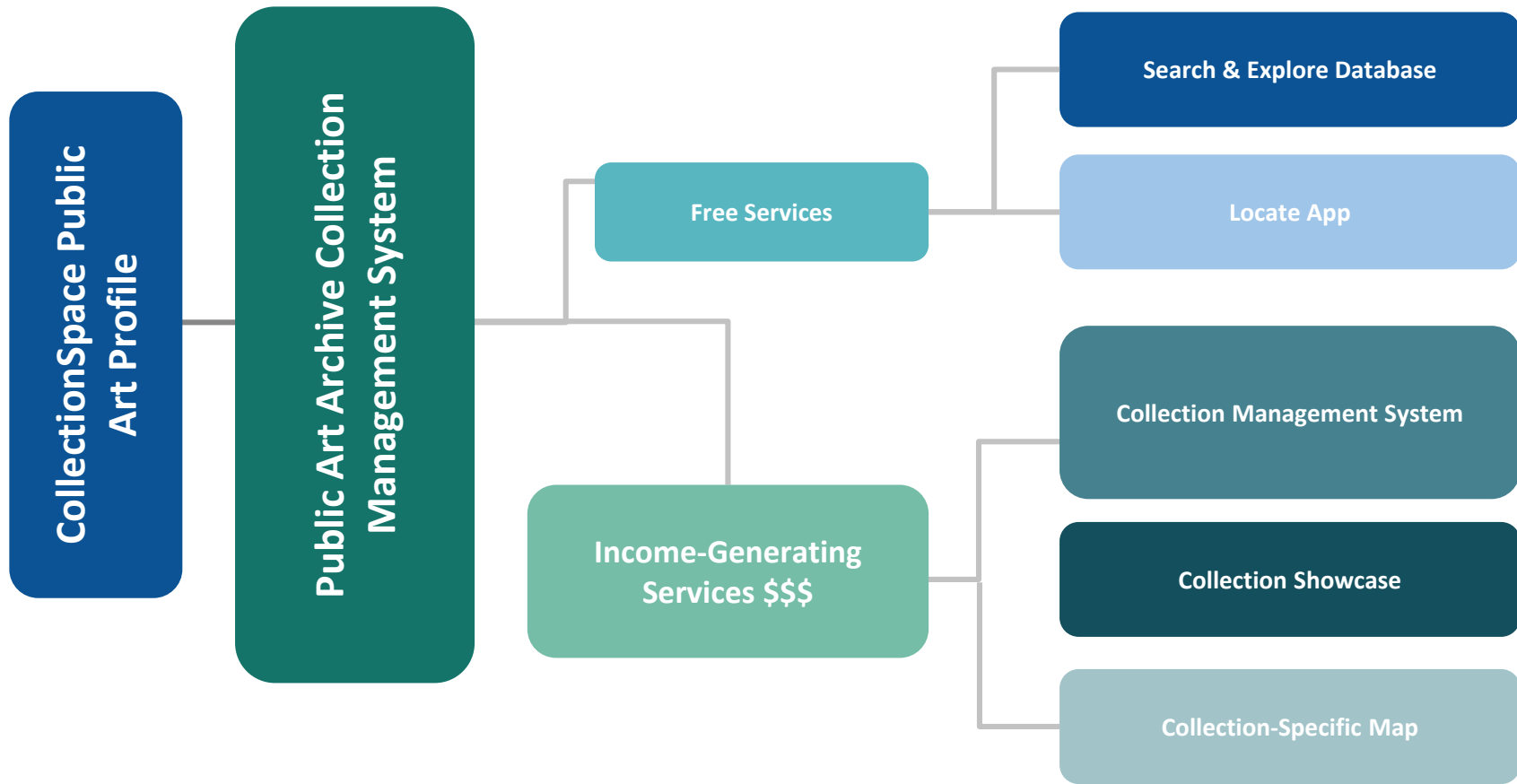
[SEE FULL COLLECTION →](#)

Identifying the Need & Space for Innovation:

- PAA's existing database software had reached end of life;
- PAA's community of users identify gap in field;
- PAA's program necessitated a shift towards financial sustainability;
- PAA's products and services needed to expand to become a necessary field resource.

Identifying a Partnership:

- 
- A rectangular area of the slide features a background of marbled paper with swirling patterns in shades of green, brown, and cream. Overlaid on this background is a list of four bullet points.
- Resources to build and deploy a collection management system in house;
 - Community-centric approach could fulfill the needs of a community-based user base;
 - A public art profile built on CollectionSpace software could provide the PAA a new home and fulfill the collection management needs of the field;
 - Collaborate with the strength of the CSpace system and technical team.



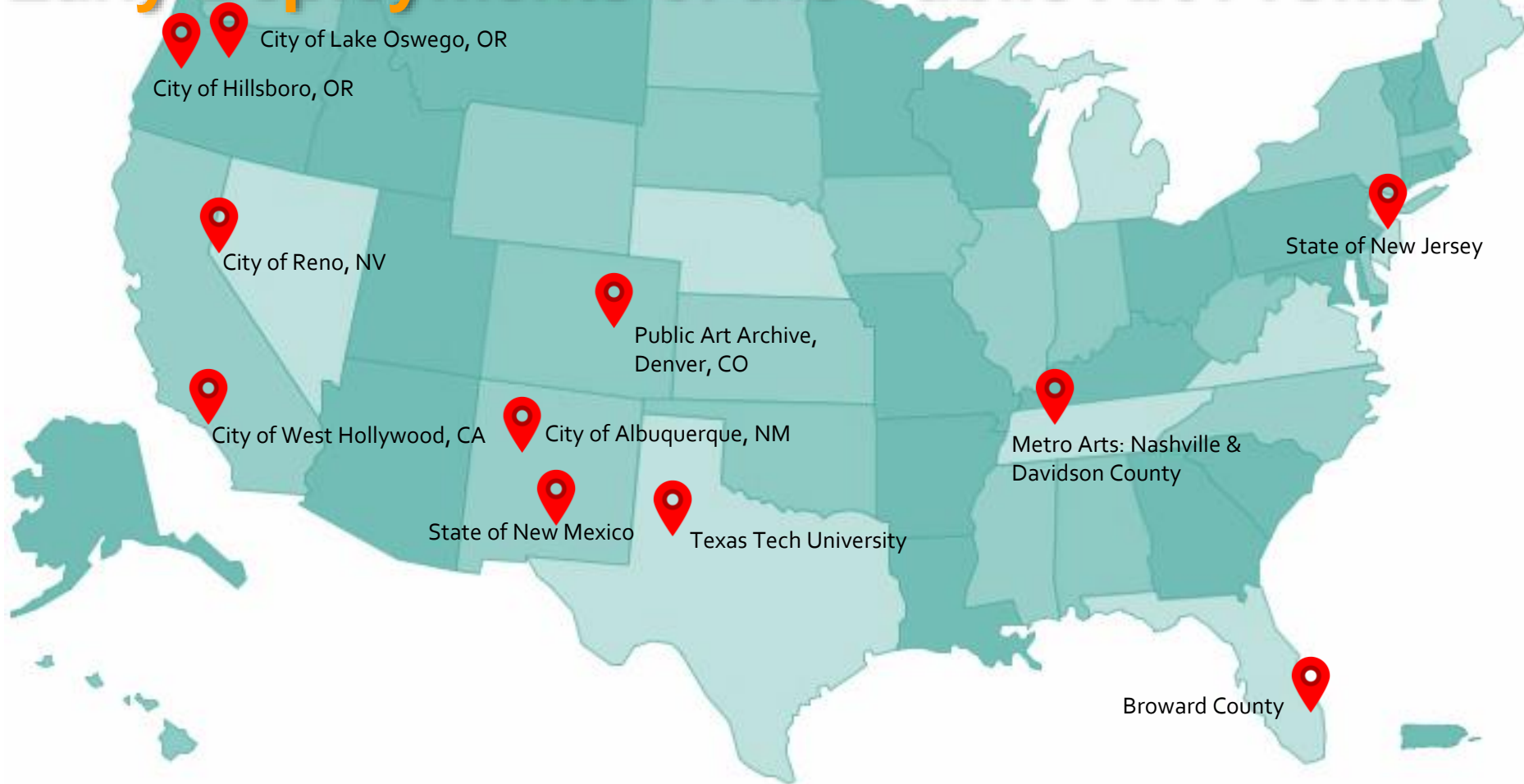
Roadblocks & Challenges:

- Reconciliation of OSS & financial sustainability - balancing the needs of the community with business goals;
- Reliance on documentation;
- Data migration;
- Re-building the data utility to publish data on front end;
- Could we be a productive CollectionSpace community member if so much of our focus would be on deploying software and enhancing front end tools?

Sustainable Financial Framework:

- WESTAF to host the Public Art Profile with system “amenities” provided by the PAA Team;
- Tenant onboarding, including data cleaning & migration, training, customer support, upgrades, and troubleshooting provided by the PAA team;
- PAA builds and deploys reports;
- PAA provides the publicly searchable web portal for clients using the Collection Management System, with the ability to further integrate engagement tools.

Early Deployments of the Public Art Profile



Browse Artworks By Location

Chicago, IL, USA



Search Results (36)

Distance ▾ Artwork Type ▾



The Four Seasons, The Chagall

Marc Chagall | 1974

Chicago, Illinois

[Directions](#)



Sol LeWitt Wall Project, Lines in Four Directions

Sol LeWitt | 1985

Chicago, Illinois

[Directions](#)



Flamingo, The Calder

Alexander Calder | 1974

Chicago, Illinois

[Directions](#)

