

Report on Samvera Visioning Processing

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At the April 2019 partners meeting in the final discussion after the visioning exercise, we collectively thought it would be useful for a small group of folks to spend more time processing all the ideas and input generated by the exercise participants, distilling the material further and then bring the results of that work back to Partners with a report and recommendations. This is that report.

Methodology

Carolyn, Ryan and Hannah worked together between June and August. We divided the exercise questions, and then each of us returned to the raw notes recorded by the exercise groups and extracted any additional details, ideas, and nuggets that we identified as valuable, interesting, or otherwise worth bringing forward in the process. We recorded these as additional points to those that had been transcribed from the whiteboard during the exercise in [our working notes document](#).

After completing this work, we decided to map the input from each group, for each question, on a grid so we could draw out and count ideas, terms, themes that recur across the groups, not unlike a frequency analysis. We wanted to see if a quantitative approach like this would reveal areas of key consensus or divergence. The raw source material is such that we felt it necessary to introduce some interpretation in the course of our analysis; it's admittedly influenced by our perspectives, but all in the interest of consolidating and relating similar points so we can get to a workable deliverable. Here is our [working doc with tables of "totals"](#). There were 7 groups total who answered the questions in our April meeting.

Results

Below is our processing of the "data" that was collected for each exercise question across the participating groups. For each question, we list the derived points (most directly from the exercise report-outs, and some from our additional processing). Following the list, we include a simple table which charts the numeric frequency of a particular data point. For most questions, we did not include a data point if it had a frequency of 1.

Question 1: Stakeholders (Who are the stakeholders of Samvera and how do we work with them?)

- The same plus more focus on the non-tech roles.
- CHO orgs and research offices, service partners that contribute and are successful, partners and adopters
- Balance with “consumers”
- End-users (in or out?) - teachers, researchers, scholars
- Defined role for non-partners/subscribers
- Understand our stakeholders well to ensure value

5	End users
4	Vendors/Service Providers
3	Libraries and Archives/ Information Orgs
3	Financial Decisionmakers/Admin
3	Technical DecisionMakers/Manager
3	Partners
3	Funders
3	Adopters
2	Repo Managers/Content Specialist

Question 2: Value (How do we produce value for the stakeholders of Samvera?)

- Software that is a joy to work with. That enables devs to be “lazy” in maintenance.
- High, shared value on accessibility and usability -
- Good documentation that makes it easier to help develop code, produce code faster
- Clearer ROI
- User focus -- including digital humanities and data science
- Service oriented
- Software that can be extended readily.
- Support learning together, that collective wisdom leads to better code. Supportive models in place for users.

- Building for to achieve confidence in our software, building code that meets peoples needs
- High premium on active participation; disfavoring passive consumption

4+	Sustainable product (stable, secure, and reduce risk)
4	User feature focus
3+	Maintain Core Components
3	Bring community together around projects, around learning
3+	Software that is well documented, easy to maintain, drive costs down/produced faster than alone
3*	Produce better UX and Accessibility together

** One group expressed this as software that enables users to discover and access content.*

+ Groups used both product and software and it wasn't clear if software was referring to product as a whole or core components.

Question 3: What is the impact of our collective work?

- Responsible tool for collections (improved technology) -
 - Better software - easy to use
 - Common set of software
- Better product via diverse ideas and contribution
- Shared contribution and sustainable model of community, shared cost and burden
- Discoverability and use improved/ impact on scholars and users
- ROI for contributors
- Better practices derived from community
 - Community a model for Open Source
 - Based on library ethics
 - For all types of users

Very focused on software, mentions of community tended to stay internally focused, some on how this impacts users and provides a model for library open source

3	Community based development
4	Building tools for everyone
3	Protecting content in a trusted manner
4	developing tools for managing digital content

Question 4: What is the common defining feature of the Samvera community membership?

- Value of collaboration, perspective of others and moving together, Confidence in Open Source
- Value inclusiveness - do not tell anyone they can't join*
- Value catalysts, sharing experiments and integration consideration
- Common technology stack to share code, benefit from shared expertise and resources
- Solving similar challenges

Point was well made that a lot of the “common” features apply to several open source repository options - what is unique about Samvera? Technology stack?

6	Shared common work on a technology stack
3	Similar needs and vested interest in repos at institutional level
5	collaboration as a strength
2	interoperability of technology
3	strong community values

Question 5: How do we set an informed and relevant technical direction?

- Built with communication broadly.
- Roadmap council finds affinities, resources accordingly
- In tune with broader open source trends and can keep pace
- Technical Manager is the glue,
- Devs are closer to researchers, evolving with the needs of researchers
- Long term road map,
- Can bring along those orgs who have trouble with keeping up
- Set metrics (measurable things) and meet them
- Stable software.
- Hosted Hyku?
- Regular inclusive development
- Long range goals and short term goals met
- Community governance that relies on groups and roles, as opposed to individuals
- Regular invest in development, engage top talent in the community
- Flexibility, agility, “keeping up with what’s out there” <- implies looking outward intentionally to the needs/activities of users and changes in open source software landscape

7	Roadmap council finds affinities, resources accordingly, plans out
5	Governance structure that enables listening to community needs and abilities
3	Keep pace with broader world
2	Direction is related to the shared vision (implies vision statement is key to technical direction)
2	Collaboration across community
1	Support those orgs who have trouble with keeping up (bring up the rear)
1	Involves low-barrier access to stable product (consider the whole potential community)

Question 6: What does the Samvera organization look like?

- Understanding shared domain, mostly volunteer
- 30% growth, contribution model in place, stable staff, relationship with fedora?
- Happy people
- 30% growth of Partners, contribution model in place, robust communication across all stakeholders
- Vibrant culture
- Inclusive, responsive
- Strong communication
- Level playing field
- Structured
- Strong relationships with consultants and vendors

4	Clear structure and roles, including dedicated staff and ongoing volunteer support from the community, established in the Lyrasis family
4	Expanded breadth of community: CHO and research institutions, global reach, trusted partners and vendors
3	Vibrant, growing, inclusive, responsive
2	Strong communication strategy and delivery
1	Clear, shared sense of purpose

Question 7: With what Organizations is Samvera aligned?

- Lyrasis/ DuraSpace/ Fedora
- Islandora?
- Not Big vendors (EBSCO)
- Funders?

- Advocates for users rights?
- Advocates for diversity in the cultural heritage space?
- Apero?
- DLF
- CLIR
- OR
- Ruby/ Rails
- Blacklight
- Vendors

Some of these need to be expanded on or cleared out. Vendors should include Notch8, DCE, etc... Curious about Ruby/ Rails and Blacklight - how to define those

2	funders
2	cultural heritage
2	DLF
2	FEora
3	DuraSpace

Question 8: Signs of sustainability (What are the signs that Samvera is a sustainable and secure organization?)

- Stable releases; more settled questions, predictable, inclusive of all stakeholders, full baked plans
- Growth, maturity of org models, financial reserves, onboarding doc, clear policies, clear governance
- Customer satisfaction, successful meetings and conferences
- Community maintenance is ongoing work, hosted services, 18 month tech plan and 2-5 year funding plan

7	Healthy financial reserves and funding stream
5	Number of partners and adopters are growing
3	Defined technical roadmap
3	Maturity of community governance

	2 Sustained community support and activity
	2 Stable software is released in a timely fashion
	2 Benefits are easily seen and valued
	2 Samvera has successful meetings and is a fixture at conferences

Vision Statements:

The Samvera Partners also worked to develop a “Vision Statement” for Samvera. We similarly evaluated each statement or statements for common themes and ideas. From this work, we can see the emphasis of the overall community and the overall value placed on each statement.

This does leave a question of whether this is the current way of viewing Samvera or the vision for where Samvera is headed. Distilling the responses to the questions above may shed light on where we’re headed and how we wish to describe ourselves to the broader community of libraries, archives, etc...

Shared solutions	3
Shared resources and knowledge	1
solve problems of discovery, access and delivery	1
flexible, extendable solution for digital content management	5
Sustainable	3
Community	3
Open community and solutions	4
Diverse	3
Solutions for all	3
Self-reflection	1

Recommendations

Carolyn, Hannah and Ryan recommend these next steps:

1. Solicit feedback on the Report on Samvera Visioning Processing by Samvera Partners (August 9 partner call)
 - a. Questions about the process
 - b. Reactions to the exercise + processing results
 - i. This report
 - ii. [Second pass at exercise - group statements](#)
 - c. Incorporate this input into plans going forward
2. Charge a small group of Partner volunteers to develop Vision Statement (or drafts)
 - a. Solicit more participation by diverse, tuned-in set of voices from community
 - i. Hannah and/or Carolyn can continue to be involved
 - ii. Marketing WG and other key community roles (eg Fundraising WG, Contribution Model WG) should be formally connected
 - b. Develop timeline for delivery (is Connect 2019 too soon?)
 - c. Develop proposal/plan for roll out no later than January 2020

Resources

- [Vision for Samvera: an exercise](#) (Samvera Partners meeting April 2019, activity description)
 - [First pass at exercise - group reports](#)
 - [Second pass at exercise - group statements](#)
- Samvera Visioning Post Processing (Work done by Carolyn, Hannah, Ryan in June-August 2019)
 - This report (self-reflective)
 - [Post-processing notes](#)
 - [Samvera Visioning Totals](#)