



The State of Samvera

23 October 2020 · Samvera Connect · Virtual

*Rosalyn Metz (Emory University)
on behalf of Samvera Steering Group*

Overview

- Overview of the Community
- State of Governance
- State of the Software



Overview of the Community



Vital Statistics

- 33 partners
- ~60 Adopters
- 1062 slack members
- 16 active Working Groups & Interest Groups

Connect 2020 by the numbers:

- 300+ attendees
- 60+ organizations
- 10 countries
- 4 continents



Samvera Virtual Connect

May 2020

- Six hours over 2 days
- 185 unique attendees
- 34 presenters!

THANK YOU, PLANNERS!

Franny Gaede (Co-Chair)

David Schober (Co-Chair)

Jon Cameron (Overseeing Comms)

James Halliday

Kevin Kochanski

Michael B. Klein



Working and Interest Groups

<https://bit.ly/samvera-wg-ig-framework>



Working Groups and Interest Groups

Reporting out on Monday

- Samvera Marketing Working Group
- Samvera User Experience Interest Group
- Samvera Metadata Interest Group
- Controlled Vocabularies Decision Tree Working Group
- Hyrax v3.0 Metadata Application Profile Documentation Review Working Group
- Samvera Repository Managers Interest Group

and Wednesday....

- Samvera Branch Renaming Working Group



Working Groups and Interest Groups

Other Active Groups

- Component Maintenance Working Group
- Hyrax Interest Group
- Hyrax Maintenance Working Group
- Hyrax-Valkyrie Development Working Group
- Samvera BrowseEverything Interest Group
- Samvera Code of Conduct Working Group
- Samvera CONTENTdm Migration Interest Group
- Samvera Geo Predicates Working Group
- Samvera Hyku Interest Group
- Samvera Infrastructure Working Group
- Samvera Newspapers Interest Group
- Samvera Roadmap Alignment Working Group



Steering Group

- Three seats elected annually; members serve 3-year rotation

For 2020-2021

1. Kevin Kochanski (Notch8)

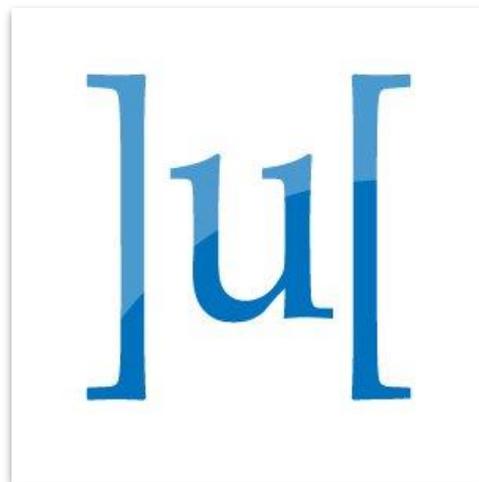
For 2020-2023

1. Esmé Cowles (Princeton University)
2. Brian McBride (University of Utah)
3. Alicia Morris (Tufts University)



Service Providers

- CoSector
- DCE
- Notch8
- Ubiquity Press



Engage in the community

Join a working or interest group! <http://bit.ly/samvera-wg-ig>

Engage with our service providers <https://bit.ly/samvera-service-providers>

Attend events <https://bit.ly/3m7Kqkc>



State of the Community



Samvera Contribution Model

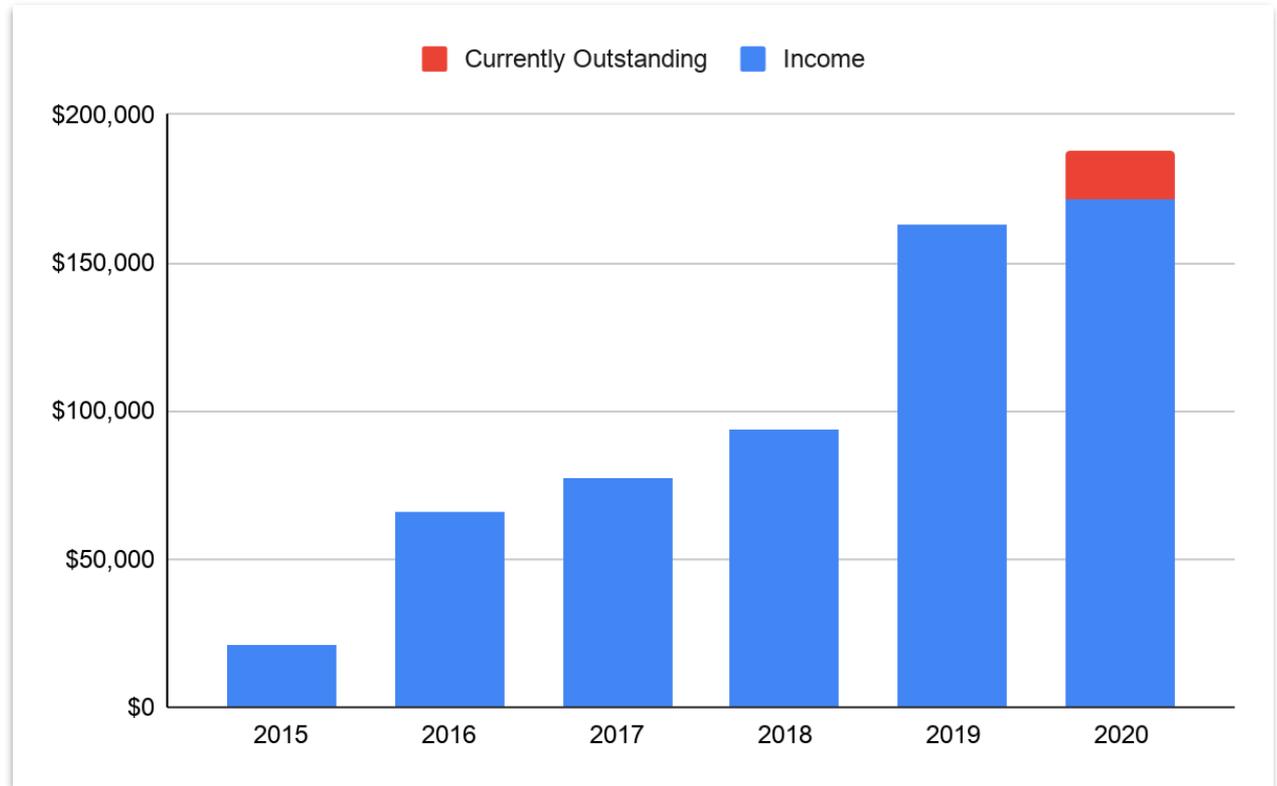
- Tiered costs based on size of the institution or service provider
- Provides a stable income to assist with hiring staff

	Very Small	Small	Medium	Large	Very Large	Sustain
<i>Institution (JSTOR or JISC)</i>	<i>Very small 10, 9, 8</i>	<i>Small 7, 6</i>	<i>Medium 5A, 5B</i>	<i>Large 4, 3</i>	<i>Very Large 2, 1</i>	
<i>Service Provider (billed hours)</i>	<i>0-3,000</i>	<i>3,001- 7,500</i>	<i>7,501- 15,000</i>	<i>15,001- 22,500</i>	<i>22,501+</i>	
Minimum Contribution	\$500	\$1,000	\$5,000	\$7,500	\$10,000	\$15,000



Samvera's Fundraising Efforts

*THANK
YOU!*



Samvera's Finances

Amount	Source
\$321,500	Balance from 2019
-\$58,000	Running costs in 2020*
\$172,000	Fundraising in 2020
\$435,500	Cash balance September 2020



** includes running cost for Operations Adviser*

Governance Recommendations

1. Steering Will Become an Elected Body from Partners
- 2. Steering Will Hire Centralized Staff**
- 3. Partners Will Develop a Contribution Model**
4. Partners Will Establish a Roadmap Council
5. Newly Established Steering Will Update Bylaws
- 6. Partners Will Assess Governance at the End of 2020**



Hiring Centralized Staff

Hiring Committee Members

- Carolyn Caizzi [Chair] (Northwestern)
- Karen Cariani (WGBH)
- Jon Dunn (Indiana)
- Jeremy Friesen (Notre Dame)
- Richard Green (Samvera/Hull)
- Brian McBride (Utah)
- Rosalyn Metz (Emory)
- Carla Ashe-Hutchinson (Emory HR Liasison)

Week	Activities
0	First Meeting (06-22)
1 - 5	Vacations, building out rubrics, timelines, questions, tooling, waiting for applicants, and scheduling (06-26, 07-02, 07-14, 07-22, 07-24, 07-29)
6 - 7	11 Phone Screenings (08-04, 08-05, 8-11)
7	Extended Interview Decision (08-12)
8	Status/Process Check (08-19)
9 - 10	3 Community Interviews (08-26, 08-28, 08-31), Recommendation Meeting (09-02)
11 - 14	All the HR things
15	Community Manager Heather Greer Klein's first day! (10-05)



Putting the Community in Context

It Takes a Village Assessment Model

Area	Governance	Technology	Resources	Community Engagement
Phase	2	3	2	2
Meaning	Growing	Stable, but not Static	Growing	Growing



<https://bit.ly/itav-oss>

Assessing Governance

Report to gain a better understanding about how adoption is moving forward.

Survey to partners digging deeper into the issues the report uncovered

<https://bit.ly/samvera-gov-survey>



Samvera Governance Review Report, 2020

August 2020

In April 2018, the Samvera Partners adopted the [recommendations](#) from a Governance Working Group that it had commissioned; these recommendations made a number of significant changes to the way in which the Samvera Community operates. The final recommendation called for a review at the end of 2019, to ensure that the governance recommendations are meeting the Community's needs. Partners deferred this assessment until the beginning of 2020.

A small group (Chris Awre, Esmé Cowles, Richard Green, Brian McBride, Margaret Mellinger) was formed to conduct the review, to determine whether or not governance recommendations are satisfying Partners, and to recommend next steps. To gauge satisfaction with the implementation of the governance recommendations, the small group developed a set of questions to be answered, delivered an exercise at the Spring Samvera Partner meeting with 41 attendees, and distributed a follow-up survey to partners and 39 other potentially interested parties. This report communicates the result of those activities, offers some next steps, and serves as the culmination of the small group's work.

Assessing Progress on Governance Recommendations

These are the recommendations from the Governance Working Group

1. Steering will become an elected body from Partners
2. Samvera will hire centralized staff
3. Samvera will develop a Contribution Model
4. Samvera Partners will establish a Roadmap Council
5. Newly established Steering will update Bylaws
6. Partners will assess governance at the end of 2019

In accordance with the sixth recommendation, we asked respondents how well Samvera is progressing on the other five. For each recommendation, we asked for one of four responses:

- a) Just getting started
- b) Making good progress but not yet fully accomplished
- c) Completed and under periodic review
- d) Don't know

The following is a synopsis of responses for each recommendation from the external survey and the exercise conducted at the online [Spring Partner meeting in April 2020](#).

Looking Ahead



Fiscal Sponsorship

The History

DuraSpace has served as Samvera's fiscal sponsor since 2015

- Handling banking, legal, purchasing, contracts, wiki space, etc.

DuraSpace-Lyrasis merger in July 2019

- Fiscal sponsorship assigned to LYRASIS

New MOU negotiated with LYRASIS

- July 2020 - June 2021



What's Next

How do we move forward?

What are the implications of that decision?

Hiring a Technical Coordinator

Assess the need for the technical coordinator role.

Identify further income streams to sustain a technical coordinator role.

Hire a technical coordinator role.



Samvera Technical Coordinator

The Samvera Community seeks a dedicated staff member to serve as a coordinator for its technical development and maintenance work. The person in this role will serve as a facilitator and provisioner of Samvera's software development efforts; an expert consultant on Samvera technology issues for adopters and integrators; and a general resource for helping coordinate and support Samvera's technical components

The Samvera Technical Coordinator will work closely with the Samvera Community Manager who has a major focus on community and communications management. Together, the two post-holders will provide support for all aspects of the Samvera Community's work.

The incumbent will report to the Chair (or the Chair's designate) of the Samvera Steering Group who will provide high-level direction. A number of employment models may be considered in discussion with candidates including direct employment by Samvera's fiscal sponsor (Lyrrasis), independent contractor relationship, employment by a Samvera Partner institution, or as a grant to an existing organization, with an agreement to second the employee to Samvera, if the candidate wishes to remain with his or her institution. The details of precise working conditions will depend on the model chosen but remote working is assumed.

Travel is required. Candidates may be located anywhere in North America or Western Europe. Salary dependent upon qualifications; benefits dependent upon employment model.

Specific duties include:

Facilitate and provision Samvera's software development efforts

This includes a combination of guiding and participating in software development. The Technology Coordinator will provide leadership in conjunction with Samvera Community's several development advisory and support groups.

Duties will include:

- developing and nurturing relationships with key stakeholders whilst fostering an environment of collaboration, trust and accountability;

State of the Software



Samvera software by the numbers

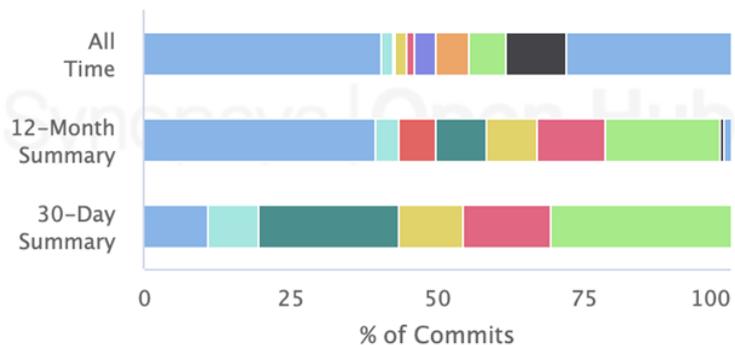
- 1.4M total lines of code
- 387 total contributors
- 48,877 total commits



Data from: <https://www.openhub.net/p/samvera>
<https://www.openhub.net/p/samvera-labs>

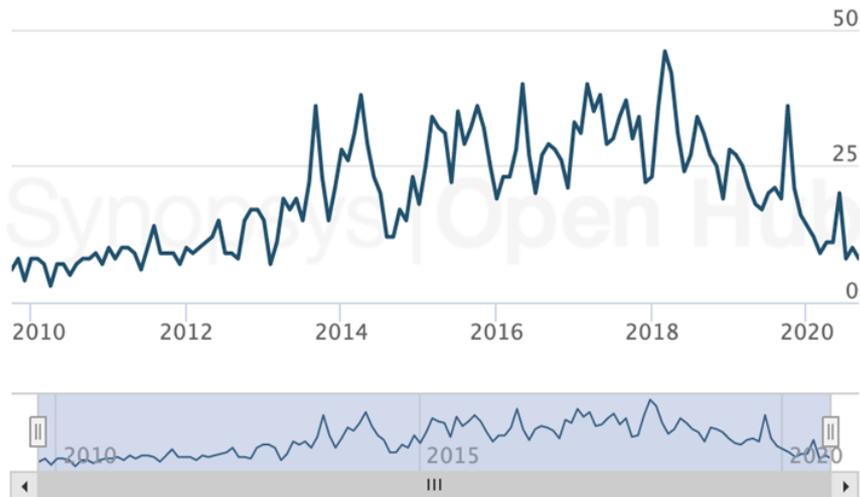
Stats about contributors*

Commits by Top Contributors



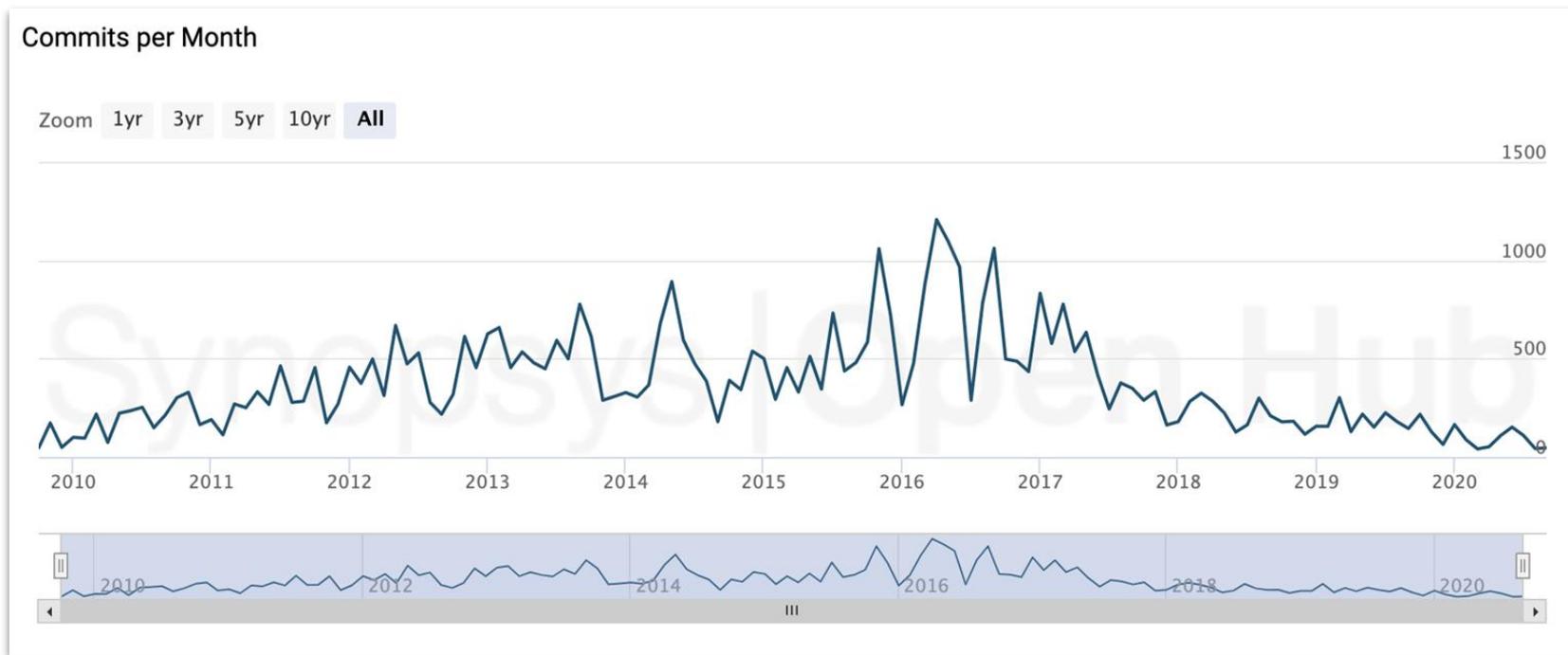
Number of Contributors

Zoom 1yr 3yr 5yr 10yr All



* data from the Samvera GitHub organization

Stats about commits*



* data from the Samvera GitHub organization

Community Development Efforts

- **Valkyrization of Hyrax** - community sprints
- **Project Surfliner** - UCSB and UCSD
- **CCMWG Sprints** - community sprints
- **Solar Vortex** - Samvera Developers Congress



Upcoming Dev Congress

November 16 - 18, 2020

Propose topics for the Dev Congress

Learn more about the upcoming Dev Congress at: <https://bit.ly/dev-congress-nov-2020>

Thanks to the planning committee

- Anna Headley
- Jeremy Friesen
- Trey Pendragon
- Kait Sewell
- Lynette Rayle
- Adam Joseph Arling



A screenshot of a LYRASIS wiki page titled "Developer Congress - November 16-18 2020". The page is created by Anna Headley and last modified by Tom Johnson about 6 hours ago. It features a navigation menu with "Home", "Topic List", "Co-development Technologies", and "Planning Group". A "Table of Contents" section lists: Welcome (with a sub-item "To help us plan, please indicate your intention to attend by signing up below."), Dates, Topics, Signup to Participate, and Communication. The "Welcome" section contains text about the annual conference and a call to action: "To help us plan, please indicate your intention to attend by signing up below." The "Dates" section lists "Monday November 16th - Wednesday November 18th, 2020" with a Zoom link and a meeting ID.

Key Support Systems: Members

Kevin Kochanski

Brian Hole

Rob Kaufman*

Jill Morris

Gretchen Gueguen

Jeremy Friesen

Kirsten Leonard

Amanda Hurford

Ellen Ramsey

Sherry Lake

Bertie Wooles

Sara Gould

Jenny Basford

Heather Greer Klein

James R. Griffin III*

Collin Brittle*

Tom Johnson*

Randall Floyd

Bess Sadler

Christina Chortaria

Michael J. Giarlo

Jessica Hilt

Julie Rudder

Kevin Musiorski

Brian McBride

Chris Colvard*

David Schober

Lynette Rayle

Julie Hardesty

Julie Allinson

Mark Bussey*

David Schober

Nabeela Jaffer*

Jon Cameron

Jennifer Young

Katherine Lynch



** indicates participation on multiple groups*

Key Support Systems: Groups

**Hyku
Interest
Group**

**Component
Maintenance
Working
Group**

**Roadmap
Alignment
Group**

**Hyrax
Interest
Group**



Updates on the major players



Hyrax



hyku

avalon

MEDIA SYSTEM



Noteworthy Grant Projects

- **Open Impact: Developing Robust Analytics for Hyrax** — Oregon Digital (IMLS)
- **Advancing Hyku: Open Source Institutional Repository Platform Development** — University of Virginia, Ubiquity Press & British Library (Arcadia Foundation)
- **Scaling Up a Collaborative Consortial Institutional Repository** — PALNI and PALCI (IMLS)



Grants and Samvera

<https://bit.ly/samvera-grants>



**Thank you, all.
Keep up the amazing work!**



