Managing Samvera-based Projects & Services

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http://bit.ly/managers-SC2018

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Code of Conduct

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Samvera Community Helpers

What We'll Cover Today

1. What to expect when managing a project
   a. What additional challenges to keep in mind with open source community projects
2. Touchpoints for engaging with the community
3. Break time
4. Activity - Navigate the Samvera information landscape
5. Working with the stakeholders and users
   a. User feedback & expectation management
   b. Local requirements vs. community feedback

What to expect when managing a project or service?

Systems Thinking:

How all the elements of the project or service would work together

Adaptability:

For changes in environment, technology, expectations and situations

Resource Management:

How much resources do we have? How can they be utilized best?

User Expectations Management:

The manager is responsible for communication with the users, manage their expectation; harmonize the communication with the development team and the users

What to expect when managing a Samvera project or service

Interacting with the community:

Talk, ask questions, go to calls/meetings/workshops

Tracking and anticipating community activity:

Are you building something? Should you work with someone on that?

Planning local releases based on the community "schedule":

Is your release coming too close to a major Hyrax (etc.) or feature release?

Touchpoints for Engaging with the Samvera Community

Consider what you're trying to accomplish:

- Getting started with Samvera
- Building a Samvera repository
- Migrating data to a Samvera repository
- Adding a feature
- Customizations
- Influence the decision making process

Touchpoints: Getting started with Samvera

Tracking the community during the project

- [Tech call](#)
- [Slack](#)
- Google group ([Samvera-Community](#), [Samvera-Tech](#), and more!)
- IG/WG
  - Repo Managers Interest Group
  - Migrations Interest Group
- Reporting issues: https://github.com/samvera/hyrax/issues

Considerations:
- Aligning local development with Community development
- Create short term wins

Why Engage and Participate?

- Awareness
  - What is the community working on?
  - What issues and projects are emerging?
  - Who has similar use cases to yours and how can you collaborate?
- Have a hand in the product
  - Planning
  - Architecture
  - Design
  - Development
- Learning - we find that people who participate often "ramp up" much faster
- Samvera is a community. This is how we do our work and we can't do it alone.

Drawbacks

- Learning curve
  - Meeting community standards
  - Learning the culture of the community
  - Learning how to contribute
- Contribution back to community can be slow(er)
  - Community standards for code may differ or be more restrictive than local (though this is how we wind up with something everyone can use)
  - Timing of development efforts may not align with local needs
- Time away from local needs

Touchpoint: Building a Greenfield Samvera repository

Primary Consideration: What are you even trying to do?

- A/V content - Avalon
- Hosted, general repository - Hyku/Hyrax via Samvera service provider
- Customized general repository - Hyrax
- All/Any of the above - roll your own

Secondary Considerations

- What features don't exist/don't you like?
- How big is your team?
- How much time/money/patience do you have?

Gap Analysis

Gap analysis of Hyrax or the solution bundle with the MVP

Hyrax Website: http://hyr.ax/

Contact Product Owners & Roadmap Council

Documentation: http://samvera.github.io/browse_pages.html

Nurax - Hosted Vanilla Hyrax: https://nurax-dev.curationexperts.com/

Known Hyrax Implementations:
https://wiki.duraspace.org/display/samvera/Hyrax+Implementations

Touchpoint: Migrating data to a Samvera repository

1. Engaging with the repository managers
2. Migration Interest group (Content DM, DSpace2Hyrax, Bridge2Hyku)
3. Possibly ask questions of:
   a. Metadata IG
   b. UXIG
4. Migration Tooling
   a. Talk to those who have migrated and leverage their work as possible
5. When possible, think forward about what the Samvera product can do

Touchpoint: Recommended approaches to feature development

- Build and push up
  - pros/cons
- Community development effort
  - pros/cons
  - One model includes:
    - Requirements
    - Design
    - Commitments
    - Effort
    - Feedback process
- Waiting for the community
  - Roadmap Council
  - SIGAAHHR, Product Owners, etc.

Customizations

- Customization is expected for most solution bundles
- BUT - don't customize yourself into a corner
  - Track customizations to allow comparison with release changes
  - Follow normal community patterns when possible
- If you're considering contributing back
  - Consider modularization/configuration
  - Communicate with PO/Tech Lead for solution bundle
- Look around at what others have done

Touchpoint: Influence the decision making process

- Interest Groups
  - Repository Management IG
  - Metadata IG
  - User Experience IG
- Working Groups
  - Feature-oriented WGs
    - Collection Extensions
  - Specialty WGs
    - Geospatial
    - Archivists
  - Distributed Usability Research Team (DURT)
- Become a Partner: see Samvera Community Framework
- Participate in discussions (everywhere!)

Break - 10 mins

Activity: Navigate the Samvera Information Landscape

- Pick one of three Hyrax technical efforts:
  - Bulk Import/Export
  - Analytics
  - Valkyrie
- Goals:
  - Let's see what we can learn about the topic, its current status
  - Make observations about the process
    - How does one find information
    - How does one find a way to participate in the effort
    - What background, skill or context do you bring to the process?

Activity: Navigate the Samvera Information Landscape

- Work on your own (5 minutes)
- Pair up, compare notes, keep exploring (10 minutes)
- Work in groups of 4, share results (15 minutes)
- Reconvene as a group and reflect on our findings and observations

Working with the stakeholders and users

User Feedback

- Expect users to request features that are not yet available
  - APIs, larger file sizes, collection-level metadata, etc.

- How do you respond?
  - Be grateful for the feedback, but do not overpromise

- When is it safe to say no?
  - This is a challenge when you're pitching a new service to users

Expectation Management

Scenario 1: Setting up Hyrax instance or migrating from another system to Hyrax WITH community involvement

Scenario 2: Setting up Hyrax instance or migrating from another system to Hyrax WITHOUT community involvement

Activity RASCI 20 min: Identify what group you belong to and see how groups can be formed

Retrospective

- How the attendees feel?

- What went well?

- What can we improve?

- What is your takeaway?

Feedback Form: https://goo.gl/forms/YHRJ0C6AtM45h6tn2

Thank you!

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