



The State of Samvera

18 October 2021 • Samvera Connect • Virtual

*Carolyn Caizzi (Northwestern University)
on behalf of Samvera Board*

Thank you to the 2021 Planning Committee!

- Karen Cariani
- Heather Greer Klein
- Ilkay Holt
- Rick Johnson
- Kevin Kochanski
- Robin Ruggaber



Overview

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



Overview of the Community



Heather Greer Klein

Community Manager

heather@samvera.org



Vital Statistics

- 33 partners
- 60+ Adopters
- 1,092 Slack members
- 14 active Working Groups & Interest Groups

Connect 2021 by the numbers:

- 200+ attendees
- 85+ organizations
- 9 countries
- 4 continents



New Partner



HYKU
for consortia






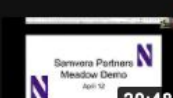
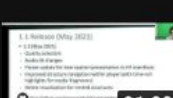
<https://www.hykuforconsortia.org/>



Repository demos from Partner Calls

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



 32:21	Samvera Repository Demo - Duke Research Repository Samvera Community
 20:40	Questioning Authority Demo Samvera Community
 11:56	Lafayette College Samvera Digital Repository Demo Samvera Community
 35:17	University of Michigan Deep Blue Data Samvera Repository Demo Samvera Community
 24:56	Penn State ScholarSphere - Samvera Repository Demo Samvera Community
 29:48	Northwestern University Meadow - Samvera Repository Demo Samvera Community
 21:00	Avalon IIIF Player Demo Samvera Community

Samvera Virtual Connect

April 2021

- Six hours over 2 days
- 150+ unique attendees
- 30 presenters

THANK YOU, PLANNERS!

Jon Cameron

Franny Gaede

Heather Greer Klein

Ilkay Holt

April Rieger

David Schober



Working and Interest Groups

bit.ly/samvera-groups



Working Group and Interest Group Reports

Today:

- Component Maintenance Working Group
- Marketing Working Group
- Repository Management Interest Group
- UX Interest Group

Tuesday:

- Roadmaps Alignment Group
- Metadata Interest Group
- Branch Renaming Working Group

Wednesday:

- Hyrax Developer Support and Engagement Working Group;
- Hyrax Interest Group; and
- Hyrax Maintenance Working Group

Thursday:

- An invitation to form a new Developer Onboarding Working Group

2021 Examples from WG and IG

Community Safety Working Group



Revised Code of Conduct & Helpers Program

Hyrax Development Support and Engagement Working Group



Technology Maintenance Hours Pledge

Roadmaps Alignment Working Group



Code Reclamation

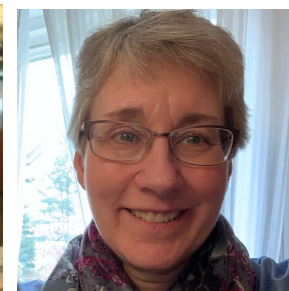
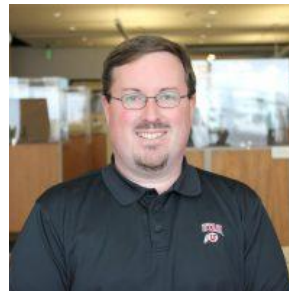
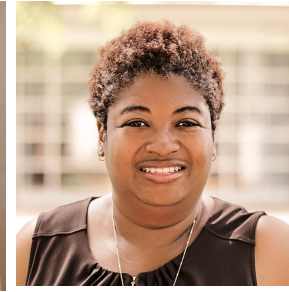


Steering → Board

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

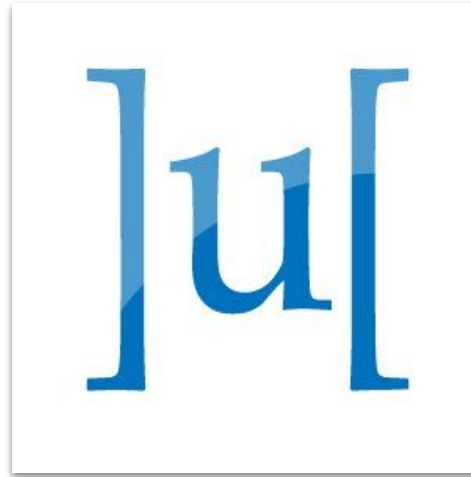
For 2021-2024

1. Rosalyn Metz (Emory University)
2. Harriett Green (Washington University in St. Louis)
3. Jeremy Friesen → Nabeela Jaffer (University of Michigan)



Service Providers

- CoSector
- DCE
- Notch8
- Ubiquity Press



State of the Governance



New Organizational Home: OASIS Open

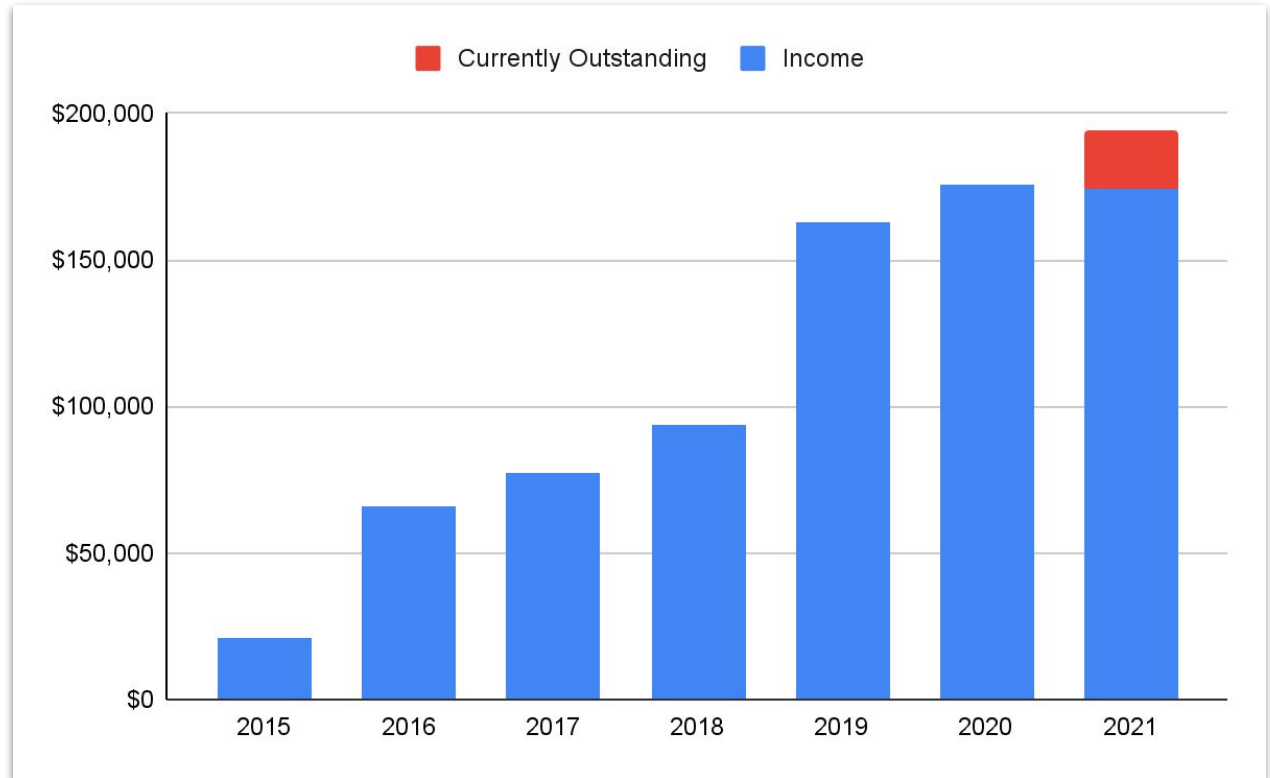


- Continued project independence
- Comprehensive fiscal and legal expertise
- Cost effective fee



Samvera's Fundraising Efforts

*THANK
YOU!*



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 Finances

Amount	Source
\$272,214	Balance from 2020
-\$48,216	Running costs in 2021 (actuals + estimated)
\$194,125	Fundraising in 2021 (\$20,000 outstanding)
\$418,123	Cash balance end 2021 (estimated)



Needs Assessment of Technical Work

Revisit Technical Coordinator role and conduct needs analysis.



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 (Lyasis), 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



Github Activity Since Samvera Connect 2020

- 35 contributors
from 14 institutions
- 80 active Github repos
- 1,724 commits

Most Active Repositories

- hyrax
- bulkrax
- iiif-react-media-player
- hyku
- hydra-head
- fcrepo-charts
- valkyrie
- avalon bundle
- serverless-iiif
- hyrax-doi

** data from the Samvera and Samvera-Labs GitHub organizations*



Noteworthy Releases



Avalon 7.2

(supplemental file support, merging items, improved authorization flow for restricted content)



Hyrax

Hyrax 3.0

(Wings/Valkyrie support)



Hyku 3.0

(theming and user management improvements, BulkraX import/export)



Valkyrie 2.2

(Fedora 6 support)

Key Support Systems: Groups

**Hyku
Interest
Group**

**Component
Maintenance
Working
Group**

**Roadmaps
Alignment
Group**

**Hyrax
Interest
Group**



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
Chris Colvard*
Heather Greer Klein*
Ilkay Holt
Jessica Hilt
Julie Rudder
Brian McBride
Collin Brittle
David Schober
Lynette Rayle
Maria Whitaker
Tim Lepczyk

James Griffin*
Collin Brittle
tamsin johnson*
Randall R
Bess Sadler
christina chortaria
Jon Cameron
Juliet Hardesty
Rob Kaufman
Mark Bussey
jen young
Nabeela Jaffer*
Kate Lynch



** indicates participation on multiple groups*

Thank You Tamsin

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Developer Congress Efforts in 2021

- React IIIF Media Player
- Hyrax Valkarization
- Dependency upgrades
- Onboarding new developers

Next Developer Congress: November 8 - 12

bit.ly/dev-congress-2021



Technology Maintenance Hours Pledge Drive

Total hours pledged: 240 hours

Goal: 768 hours

Pledge by: December 15, 2021

bit.ly/samvera-maintenance



Grants and Samvera

bit.ly/samvera-grant-support



Julie Allinson Award

Please donate to the Award Fund

samvera.org/julie-allinson-award



Thank you, all.

Keep up the amazing work!

Samvera: a vibrant and welcoming community of information and technology professionals who **share** challenges, **build** expertise, and **create** sustainable, best-in-class **solutions**, making the **world's** digital collections **accessible** now and into the **future**.



Samvera software by the numbers

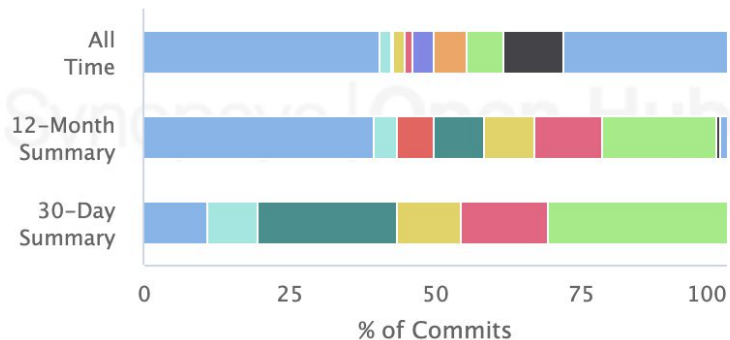
- 1.4M total lines of code
- 396 total contributors
- 49,534 total commits



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

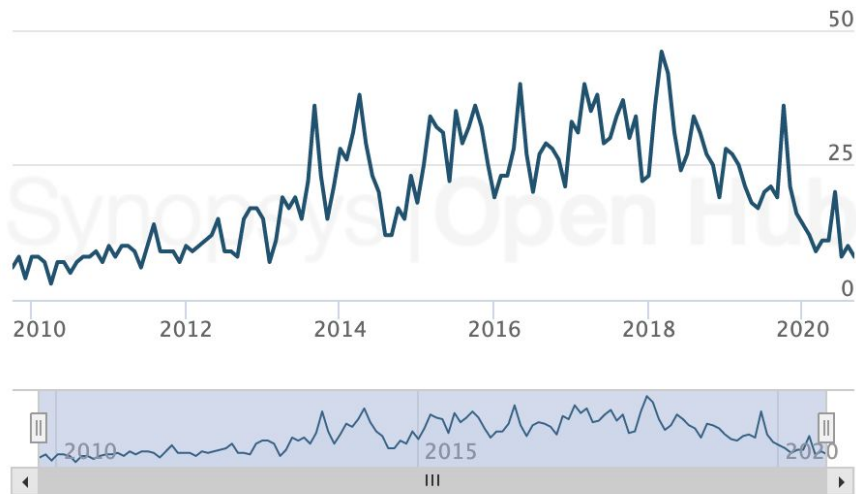
Stats about contributors*

Commits by Top Contributors



Number of Contributors

Zoom 1yr 3yr 5yr 10yr **All**



* data from the Samvera GitHub organization

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)



Communications

- 2018 Annual Report
- Technology White Paper (March 2019)
- Samvera Community Overview (October 2019)



partner profiles: princeton



Princeton first became involved in the Samvera community looking for a more sustainable way of managing our repository. Our pilot project was developing an application to manage our Latin American Ephemera collection. Based on our experience with that project, we began growing our development team and building the Plum repository based on CurationConcerns, and then Hyrax. As we scaled up to a production release, we struggled with poor performance on our largest items

(such as books with cases increasingly number of options including working Samvera stack, an instead of Fedora our highest priority we could share with have found very valuable collaboration, and problems.



State of Samvera Technology in 2019 :

The Samvera Community: An Overview

Samvera is a grass-roots, open source community creating best in class digital asset management solutions for Libraries, Archives, Museums and others.

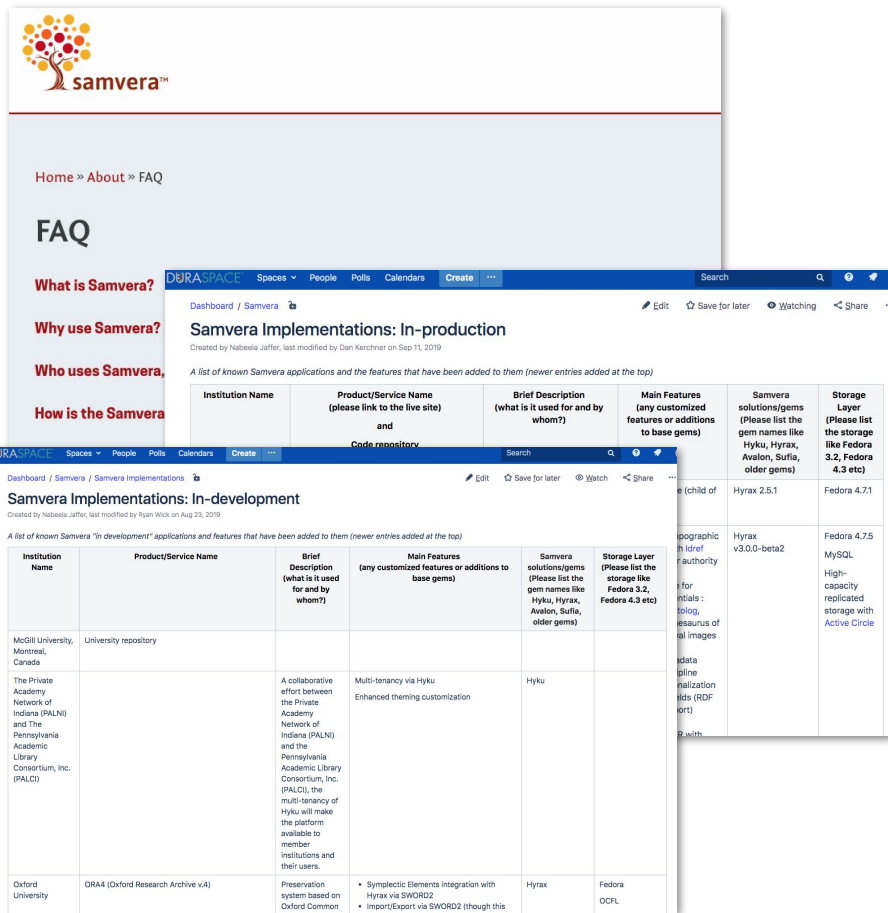
Samvera is based on the premise that no single system can provide the full range of repository-based solutions for a given institution's needs and that no single institution can resource the development of a full range of solutions on its own. Working together, the Samvera Community creates sustainable solutions using a common infrastructure within which there is the flexibility to tailor solutions to local demands and workflows.

Samvera software is free and open source, available under an Apache 2 license, and is based around four major components:

- the Fedora repository software providing a robust, durable repository layer for persisting and managing digital objects.
- Solr indexes, providing fast access to information about an institution's repository content.
- Blacklight, a Ruby on Rails plugin that sits above Solr and provides faceted searching, browsing and tailored views on objects.
- Samvera gems: Ruby on Rails components that integrate the building blocks to form a complete, flexible and extensible digital repository solution.

Communications

- FAQs
- Implementations Lists



The screenshot displays the Samvera website interface. The top navigation bar includes the Samvera logo and a search bar. The main content area is divided into two sections: "FAQ" and "Implementations Lists".

FAQ Section:

- Home » About » FAQ
- FAQ
- What is Samvera?
- Why use Samvera?
- Who uses Samvera?
- How is the Samvera

Implementations Lists Section:

Samvera Implementations: In-production

Created by Nabesha Jaffer, last modified by Dan Karchner on Sep 11, 2019

A list of known Samvera applications and the features that have been added to them (newer entries added at the top)

Institution Name	Product/Service Name (please link to the live site) and Code repository	Brief Description (what is it used for and by whom?)	Main Features (any customized features or additions to base gems)	Samvera solutions/gems (Please list the gem names like Hyku, Hyrax, Avalon, Sufia, older gems)	Storage Layer (Please list the storage like Fedora 3.2, Fedora 4.3 etc)
McGill University, Montreal, Canada	University repository				
The Private Academy Network of Indiana (PALNI) and The Pennsylvania Academic Library Consortium, Inc. (PALCI)		A collaborative effort between the Private Academy Network of Indiana (PALNI) and the Pennsylvania Academic Library Consortium, Inc. (PALCI), the multi-tenancy of Hyku will make the platform available to member institutions and their users.	Multi-tenancy via Hyku Enhanced theming customization	Hyku	
Oxford University	ORA4 (Oxford Research Archive v4)	Preservation system based on Oxford Common	• Symplectic Elements integration with Hyrax via SWORD2 • Import/Export via SWORD2 (though this	Hyrax	Fedora OCFL

Samvera Implementations: In-development

Created by Nabesha Jaffer, last modified by Ryan Wick on Aug 23, 2019

A list of known Samvera "in development" applications and features that have been added to them (newer entries added at the top)

Institution Name	Product/Service Name	Brief Description (what is it used for and by whom?)	Main Features (any customized features or additions to base gems)	Samvera solutions/gems (Please list the gem names like Hyku, Hyrax, Avalon, Sufia, older gems)	Storage Layer (Please list the storage like Fedora 3.2, Fedora 4.3 etc)
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Oxford University	ORA4 (Oxford Research Archive v4)	Preservation system based on Oxford Common	• Symplectic Elements integration with Hyrax via SWORD2 • Import/Export via SWORD2 (though this	Hyrax	Fedora OCFL



Outreach and Presence in Broader Circles

- **Standards for Sustainability: Perspectives from the Repository Community - Fedora and Samvera**

Mark Matienzo, August 2019



- **Sustainable Digital Repository Solutions & Community of Practice**

Robin Ruggaber & Jamie Little, October 2019



- **Samvera Overview** at Sierra European User Group, Chris Awre



- **It Took a Village: The evolution of Samvera**

Rosalyn Metz, Carolyn Caizzi & Jon Dunn, December 2019



Looking Forward and Outward



Thank you and farewell



Steve Van Tuyl
Hyrax Product Owner



Ryan Steans
Avalon Community Manager



Carolyn Cole
Long-time Samvera Developer



Finances



\$321,500 — balance from 2019
\$ 58,000 — running costs in 2020
(includes full year of operations adviser salary)
\$172,000 — raised in 2020
\$435,500 — cash balance
September 2020

THANK YOU!

samvera

Regional Meetings

- UC San Diego (May 2019)
- Samvera Europe
(December 2018, March 2019, October 2019)



Samvera Connect 2020

One word:
Unparalleled

Come to Friday's closing plenary for details!

