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

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


Attend events [https://bit.ly/3m7Kqkc](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

<table>
<thead>
<tr>
<th></th>
<th>Very Small</th>
<th>Small</th>
<th>Medium</th>
<th>Large</th>
<th>Very Large</th>
<th>Sustain</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Institution</strong> (JSTOR or JISC)</td>
<td>Very small 10, 9, 8</td>
<td>Small 7, 6</td>
<td>Medium 5A, 5B</td>
<td>Large 4, 3</td>
<td>Very Large 2, 1</td>
<td></td>
</tr>
<tr>
<td><strong>Service Provider</strong> (billed hours)</td>
<td>0-3,000</td>
<td>3,001-7,500</td>
<td>7,501-15,000</td>
<td>15,001-22,500</td>
<td>22,501+</td>
<td></td>
</tr>
<tr>
<td><strong>Minimum Contribution</strong></td>
<td>$500</td>
<td>$1,000</td>
<td>$5,000</td>
<td>$7,500</td>
<td>$10,000</td>
<td>$15,000</td>
</tr>
</tbody>
</table>
Samvera’s Fundraising Efforts

THANK YOU!

![Bar chart showing fundraising efforts from 2015 to 2020. The chart indicates a significant increase in income from 2015 to 2020, with a notable amount currently outstanding in 2020.](chart.png)
## Samvera’s Finances

<table>
<thead>
<tr>
<th>Amount</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>$321,500</td>
<td>Balance from 2019</td>
</tr>
<tr>
<td>-$58,000</td>
<td>Running costs in 2020*</td>
</tr>
<tr>
<td>$172,000</td>
<td>Fundraising in 2020</td>
</tr>
<tr>
<td>$435,500</td>
<td>Cash balance September 2020</td>
</tr>
</tbody>
</table>

* 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 Liaison)

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

It Takes a Village Assessment Model

<table>
<thead>
<tr>
<th>Area</th>
<th>Governance</th>
<th>Technology</th>
<th>Resources</th>
<th>Community Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Meaning</td>
<td>Growing</td>
<td>Stable, but not Static</td>
<td>Growing</td>
<td>Growing</td>
</tr>
</tbody>
</table>

[link to assessment model](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

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 provider 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 (iunael), 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**

- **All Time**
- **12-Month Summary**
- **30-Day Summary**

<table>
<thead>
<tr>
<th>% of Commits</th>
<th>Justin Coyne</th>
<th>Jeremy Friesen</th>
<th>Adam Wead</th>
<th>E. Lynette Rayle</th>
<th>Tom Johnson</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-25</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
</tr>
<tr>
<td>25-50</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
</tr>
<tr>
<td>50-75</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
</tr>
<tr>
<td>75-100</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
<td>🟦</td>
</tr>
</tbody>
</table>

**Number of Contributors**

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

![Graph showing number of contributors over time]

*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
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
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

Thank you, all.
Keep up the amazing work!