ITAV OSS Sustainability: Why and What

- Working with members
  - Identify issues, provide solutions
  - Concerns around open source sustainability
- IMLS funded *It Takes a Village*, 2017
- Intended grant outcomes
  - Survey, 2 day forum, and roadmap/resource allocation guidelines
  - 27 programs; 49 participants
  - Opportunities for joint projects & collaborations

www.lyrasis.org/itav
**ITAV Background: Who**

**LYRASIS Co Directors**
- Laurie Gemmill Arp
  - Director, CSCSS
- Megan Forbes
  - Program Manager, CollectionSpace

**Advisory Group**
- Rob Cartolano
  - Associate VP for Technology & Preservation - Columbia Libraries
- Tom Cramer
  - Assistant UL and Director - Digital Library Systems & Services
  - Stanford University
- Michele Kimpton
  - Director of Business Development, Senior Strategist - DPLA
- Katherine Skinner
  - Executive Director - Educopia Institute
- Ann Baird Whiteside
  - Librarian/Asst Dean for IS - Harvard Grad School of Design
Leaders and Participants
ITAV Background: Survey and Forum

• Survey
  • Questions for all 27 participating programs
    • Governance, audience, releases, roadmap, code committers, implementers, staff, RSPs, budget, competition, stage, etc.
  • Expected
    • Find commonalities that we could draw conclusions from, e.g. project of certain size, funding type, license etc. – more likely sustainable – not found
    • Results refocused our forum activities

• Forum
  • Dynamic small groups to answer:
    • What are the components of sustainability?
    • Where would you place your own project along various axis?
    • Do you know how to move ahead or stay successful?
    • What do you do when things take a hard turn?
• Sustainability is not one thing, nor is it a straight line
  • Sustainable programs grow from community needs
• Sustainability has *facets* that move in cyclical *phases* - together and separately
• Gathered information from survey and forum to develop a Guidebook to serve as a practical reference source for OSS programs
• Getting Started
• Growing
• Stable, but not Static
For each facet, give your program a score from 1-10 based on your knowledge of the program’s strengths and weaknesses in that area. Scores between 0-3 will align most closely with Phase I, between 4-7 with Phase II, and 8-10 with Phase III.

Facet: Governance
“A governance model describes the roles that project participants can take on and the process for decision making within the project. In addition, it describes the ground rules for participation in the project and the processes for communicating and sharing within the project team and community.”

Facet: Technology
The core of each of these programs is an open source software application serving cultural heritage organizations. There are parallels with proprietary software development processes, but working within the open source world brings its own challenges around community, resources, and governance that affect the software development process.

Facet: Resources
In order to launch, grow, and thrive, OSS programs need resources both human and fiscal. Human resources encompass engineers writing code, community members providing use cases, or organizational homes with fiscal stewardship. Financial resources come in and go out in a wide variety of ways - in via contributions, grants, dues, sponsorships, etc., and out via salaries, servers, overhead, etc.

Facet: Community Engagement
The Community Engagement facet reflects efforts to facilitate and foster engagement within a community. It is focused on encouraging users to become stakeholders. A component of this facet also includes communication and outreach efforts to the community itself as well as the wider world of decision makers, potential users, funding agencies and others.
Forum Feedback

“It gave me valuable insights into how we might do things better”
Will discussions at the forum be considered as your plans for the future?
100% said yes

Guidebook Use Cases

"ITAV guidebook is an invaluable tool for institutions understanding OSS Development...It has been very useful and highly informative to... SimplyE in their efforts." – James English, SimplyE

“The VIVO project has been exploring ways to engage our governance group ...and the ITAV guidebook came along at exactly the right time for our project ...I know we’ll benefit from the collective wisdom and best practices provided.”

- Julia Trimmer, VIVO

Valuable language for grant proposals – IMLS

Useful as overall structure to evaluate overall program sustainability (outside of open source)
Next...

Proposing Implementation Toolkit

If questions, we are happy to follow up separately at DLF or via email:

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Guidebook and project info at: www.lyrasis.org/itav
please contact us for more info

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