Perspectives from the Repository Community: Fedora and Samvera

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Overview and acknowledgements

- **Evolution & interconnection** of facets from ITAV wheel for Fedora and Samvera, focusing on changes to **Governance & Resources** in response to challenges

- Gratitude to **Rosalyn Metz** (Emory University) and **Michael Giarlo** (Stanford University) for ideas and feedback
Background

Fedora

- Project with 22+ year history
- Used by over 450 organizations in 46 countries
- Multiple evolutionary steps from research project to core infrastructure
- A core component of repository applications and systems

Samvera

- Project with 11 year history; formerly known as Hydra
- Used by over 80 organizations in 10 countries
- First developed as framework to build applications with Fedora
- Related but distinct community from Fedora

Understanding the landscape

- Both Fedora and Samvera are arguably mature across all four facets of the ITAV framework
- “Stability” is relative across communities
- Considerable evolution in governance and resources also tied to changes in the two other ITAV facets: technology and community engagement
Fedora’s challenges

- **Technology**
  - Fedora 4 as significant technical shift
  - Concerns: persistence transparency, complexity, performance, trust
  - Barriers to migration from Fedora 3 to 4

- **Resources**
  - Trend changes in membership revenue
  - Lack of geographic diversity in membership

- **Governance**
  - Leadership doesn’t represent geographic diversity of user base
  - Potential gaps in stakeholder input

1. “Designing A Migration Path: Assessing Barriers Upgrading to Fedora 4.x.” [https://wiki.duraspace.org/x/UR4RBg](https://wiki.duraspace.org/x/UR4RBg)
Fedora’s evolutionary strategies

- **Community engagement**
  - Key to membership, and hence governance and resources
  - Vary strategies between regional distribution of adoption/members

- **Membership (resources and governance)**
  - Lower dependency on specific countries/membership tiers
  - Targeted outreach strategies

- **Governance**
  - Creation of Vision and Strategy Task Force
  - Organization of work through strategy template and white papers

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### Fedora strategy template: governance

<table>
<thead>
<tr>
<th>Guiding Principle</th>
<th>Now</th>
<th>Seen</th>
<th>Later</th>
<th>Desired Future Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fedora Leadership</td>
<td>ARTICULATE The current governance process</td>
<td>IDENTIFY Metrics for assessing leadership's engagement with governance</td>
<td>Assess Leadership's engagement with governance</td>
<td>An actively engaged governance group that revolves around the needs of Fedora and helps to ensuring coherence between the major community software projects.</td>
</tr>
<tr>
<td>Membership strategy</td>
<td>A membership strategy and implementation plan (including risk assessment) that supports the financial sustainability of Fedora</td>
<td>The strategy and implementation plan</td>
<td>Build a diverse foundation of contributing members with an expanded, international, activity-contributing membership base</td>
<td>An adaptable fiscal strategy and budget that aligns with our financial sustainability plan and supports our strategic plan, goals, and initiatives.</td>
</tr>
<tr>
<td>Assessment Plans as needed for strategies and processes listed in the Governance section.</td>
<td>DOCUMENT metrics for assessing each of the governance areas</td>
<td>Design Assessment procedures for each area, including external reviews where appropriate</td>
<td>Implement Regular assessments based on defined procedures</td>
<td>Our membership supports the financial sustainability of Fedora. We have a diverse foundation of contributing members with an expanded, international, activity-contributing membership base.</td>
</tr>
<tr>
<td>Strategic Planning</td>
<td>DEVELOP A strategic plan, with mission and vision statements, that encompasses topics listed in this Governance section (Leadership, financial sustainability, fiscal strategy, etc.)</td>
<td></td>
<td></td>
<td>Regular internal and external assessment events for governance, product, staff, members, and community that inform an active, adaptive approach to updating the strategic roadmap.</td>
</tr>
</tbody>
</table>

Samvera’s challenges

- Impacts all four areas, but still focused on governance and **resources**
- Community engagement and technology needed stronger direction and leadership
- Partnership model is unclear, both in terms of expectations, level of contribution, and what partners receive in return; fear of bifurcation from vendors
- Lack of program staff to coordinate efforts
Samvera’s evolutionary strategies

- Development of governance proposal\(^6\) by working group
- Transition Samvera steering to elected body
- Hire staff (technical coordinator; community manager)
- Develop contribution model (both financial & in-kind)\(^7\)
  - Financial model based on JSTOR tiers and Jisc bands
  - Expansion of models to vendors
- Establish roadmap council\(^8\)
- Update bylaws; assess governance at end of 2019

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\(^7\) “Samvera Contribution Model Working Group.” [https://wiki.duraspace.org/x/Mw7IBQ](https://wiki.duraspace.org/x/Mw7IBQ)

\(^8\) “Samvera Roadmap Council.” [https://wiki.duraspace.org/x/nlU7Bq](https://wiki.duraspace.org/x/nlU7Bq)
Revised Samvera governance model

Things to consider

- Projects like Fedora and Samvera are “messy” in the ITAV framework
- Stable governance may mean calcified, unclear, and exclusionary governance
- Exit strategies lacking emphasis across ITAV framework
Thank You!

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