

# 2023-02-14 DSpace Leadership Group Meeting

## Date

14 Feb 2023 10:00-12:00 Eastern Time

Zoom:

Join from PC, Mac, Linux, iOS or Android: <https://lyrasis.zoom.us/j/5025273040?pwd=RTk4QUhISnhPRi9YenVrTFJKbDlIQT09>

Meeting ID: 502 527 3040

Passcode: dspace

One tap mobile

+13126266799,,5025273040#,,,,,0#,,995571# US (Chicago)

+13017158592,,5025273040#,,,,,0#,,995571# US (Washington D.C)

Meeting ID: 502 527 3040

Passcode: 995571

Find your local number: <https://lyrasis.zoom.us/u/aoVg8CoUw>

## Leadership Group Members

- ~~Nada Mahmoud Aboucata~~, Qatar University
- ~~Tal Ayalon~~ World Bank Group
- ~~Pascal Nicolas Becker~~ The Library Code\*
- ~~Isabel Bernal~~ Spanish National Research Council CSIC
- ~~Jose Carvalho~~ KEEP Solutions\*\*
- ~~Corey Davis~~, University of Victoria Libraries
- ~~Lieven Droogmans~~ Atmire\*
- ~~Victor Gomez~~ CONCYTEC
- ~~Barbara Hirschmann~~ ETH Zurich
- ~~Jyrki Ilva~~ National Library of Finland ★
- ~~Erica Johns~~ Cornell University
- ~~Joanna Lee~~ George Mason University
- ~~Agustina Martinez~~ University of Cambridge \*
- ~~user 11d0a~~ Duke University Libraries
- ~~Erik Moore~~ University of Minnesota\*
- ~~Susanna Mornati (4Science)~~ \*
- ~~Jere Odell~~ IUPUI\*
- ~~Susan Wells Parham~~ Georgia Institute of Technology
- ~~Kristi Park~~ Texas Digital Library\*
- ~~Jussi Piipponen~~ FinELib-consortium
- ~~Beate Rajske~~ DSpace-Konsortium Deutschland
- ~~Bronwen Sprout~~ The University of British Columbia
- ~~Maureen Walsh~~ The Ohio State University Libraries\* (Chair)

## LYRASIS attendees

- ~~Laurie Gemmill Arp~~
- ~~Tim Donohue~~
- ~~Natalie Baur~~
- ~~Michele Mennielli~~

The ★ represents who will be taking notes for a given meeting. It rotates after each meeting to the next person in the attendee list.

\*Members of DSpace Steering Group

\*\*Community At Large Representative

\*\*\*Ex-officio member nominated by the Leadership Group as representative of the community at large. Ex-officio members do not have voting rights

## Agenda

	Time	Item	Information	Who
1	5 min	Welcome	<ul style="list-style-type: none"><li>• Welcome</li><li>• Thank you to note-taker</li></ul>	Maureen

2	15 min	Financials	<p>DSpace quarterly financial report (through Dec. 31, 2022) sent via email</p> <ul style="list-style-type: none"> <li>Budget is a plan; quarterly financial reports provide updates</li> <li>Overall, it is positive to budget (financial plan)</li> <li>The fiscal year is July 1- June 30. This reports reflects the halfway period.</li> <li>Report reflects payment of 7.4 contract labor invoices (7.5 work in progress, not invoiced yet)</li> <li>Variances include: <ul style="list-style-type: none"> <li>Positive to budget to date: membership dues (includes onetime donations), travel, IDC</li> <li>Negative to budget: service provider fees, SCOSS pledges, consultants</li> </ul> </li> <li>Will need to accelerate fundraising efforts to continue to support funded development</li> </ul>	Laurie
3	20 min	Fundraising	<p>Fundraising Update</p> <ul style="list-style-type: none"> <li><a href="#">SCOSS fundraising</a></li> <li><a href="#">Development Fund</a> <ul style="list-style-type: none"> <li>Funding for DSpace 7.6</li> </ul> </li> <li>Targeted outreach</li> </ul>	Laurie, Kristi
4	10 min	7.x Development	<p>Development Update</p> <ul style="list-style-type: none"> <li>DSpace 7.5 - Due Feb 20, 2023. Some new features coming soon: <ul style="list-style-type: none"> <li>Major performance improvements to initial page load (via additional User Interface caching &amp; minimization)</li> <li>Subscribe to email updates from a Community or Collection (similar to 6.x, but now includes Communities too)</li> <li>Supervision orders allow Admins to assign a supervisor to new submissions (similar to 6.x JSPUI)</li> <li>Ability to display user registrations or restrict them to specific email domains (similar in 6.x)</li> <li>Support for custom Configurable Workflow steps, including "Select Single Reviewer Workflow" and "Score Review Workflow" (which both existed in 6.x)</li> <li>Search interface supports filtering by controlled vocabularies (similar to 6.x)</li> <li>Support for Contextual Help Tooltips (similar to 6.x)</li> </ul> </li> <li>With 7.5, we have completed <i>porting</i> all 6.x features that are listed in Tiers 1 - 3 in the <a href="#">prioritized list of features</a>. <ul style="list-style-type: none"> <li>NOTE: There are a handful of brand new features (never implemented in DSpace before) still open in those Tiers as we've been concentrating on porting features from 6.x to 7.x.</li> </ul> </li> </ul>	Tim
5	15 min	Development Cycle	<p>Development Cycle and Announcement Approved by Steering</p> <ul style="list-style-type: none"> <li>A community <a href="#">announcement</a> will be sent following Leadership meeting</li> <li>Development cycle details <ul style="list-style-type: none"> <li>DSpace 7 <ul style="list-style-type: none"> <li>Steering will determine feature 6.x parity</li> <li>DSpace 7 development will end when we hit feature parity milestone <ul style="list-style-type: none"> <li>Bug and security fixes for DSpace 7 will continue with minor 7.x releases following our software support policy, but no new features will be added</li> </ul> </li> </ul> </li> <li>DSpace 8 and after <ul style="list-style-type: none"> <li>Return to one major release with new features per year and minor releases for bug fixes/security updates</li> </ul> </li> </ul> </li> <li>Comments, questions, or feedback from Leadership?</li> </ul>	Tim, Maureen
6	10 min	DCAT	<p>DSpace Community Advisory Team (DCAT) update</p> <ul style="list-style-type: none"> <li><a href="#">Meetings</a> - all welcome <ul style="list-style-type: none"> <li>DCAT is dedicating monthly calls through July 2023 to support all (IR managers, developers, etc.) who are implementing DSpace 7.x</li> </ul> </li> <li>DSpace 7.x user-facing documentation <a href="#">Learning DSpace</a></li> <li>Call for nominations for Chair</li> </ul>	Maureen
7	15 min	Community Event	<p>Planning for Community Events</p> <ul style="list-style-type: none"> <li>Call for volunteers</li> </ul>	Kristi, Susanna, Pascal, Erik
8	5-10 min	Open Repositories	<p>OR2023 June 12-15, 2023, Stellenbosch, South Africa</p> <ul style="list-style-type: none"> <li>Attending? Submitted proposals?</li> </ul>	Maureen
9	10 min	Other business	<p>Updates as time permits</p>	All

## Notes

### 1. Welcome

Maureen opened the meeting.

### 2. Financials

Laurie presented an overview of the DSpace finances. The overall situation is good. Total revenues are as budgeted. Expenses are a little lower than expected. DSpace 7 development is now paid till 7.4, but the 7.5 bills will still need to be figured out before the Steering Group can decide how much money can be spent on the 7.6 development. The 7.6 funding will be discussed in the February meeting of the Steering Group.

### 3. Fundraising

Kristi gave an update on the fundraising efforts. DSpace was one of the funding targets for the third SCOSS funding round. So far there have been pledges for a total of \$174,000 over three years, which is significantly less than was expected. Natalie Baur has been hired to a part-time position with this money. Kristi is still working with SCOSS, but as the fourth SCOSS funding round has already started, some of the attention is likely to move to other projects. Part of our focus has now moved to trying to encourage the new members that joined to continue their membership after the three-year period.

The DSpace Development Fund is targeted to existing members. So far there has been \$81,000 raised, with \$6,000 from the University of Cambridge being the most recent addition.

Kristi noted that the outreach so far has been a broad ask to the community, but there are plans to target specific organizations and decision-makers, especially well-funded, large organizations that are using DSpace. Organizations can also be asked to upgrade their membership level. Scott Hanrath has promised to help in this, but other help in contacting the organizations is also welcome.

There was a discussion on whether it would be possible to contact the people who attended the very popular DSpace 7 webinars in the fall. Tim noted that Lyrasis did already do outreach to the people who had given a permission for this, but there were no results. Kristi suspected that the webinar attendees were mostly practitioners, who don't make decisions on where the money goes. It would be important to find the right people and build long-term relationships with them.

Beate pointed out that it might be worthwhile to reach out to library consortia, which might be able to raise money locally, like the German consortium has done.

Isabel mentioned that the webinars were very well attended from Latin America and Spain. She said that she can send contact information for the decision-makers in these countries, if necessary.

Michele added that the 20+ national and regional DSpace user groups were formed to get closer to the local communities and to replicate the kind of approach that has worked in countries like Germany and Finland. The benefit of this work is that we now know who we should talk to.

#### **4. 7.x Development**

Tim noted that the 7.5. release will be announced on Monday. Almost everything has been done.

Some of the new features were listed in the agenda of this meeting, but there are lots of smaller enhancements and fixes as well. All of the missing DSpace 6 features from the three highest tiers of the prioritization list are now included.

#### **5. Development Cycle**

The development cycle of future versions of DSpace will be adjusted as we reach parity with DSpace 6, either in DSpace 7.6 or 7.7. So far every DSpace 7 dot release has been a major release with lots of new features and changes in the code. As it is difficult for the community to do major upgrades all of the time, there will be a return to the old differentiation between major and minor releases. After reaching parity, the new DSpace 7 versions will only contain security and bug fixes, and DSpace 8.0 will be the next version with new features.

The LG members had no issues with the text of the planned announcement. However, there was quite a bit of discussion on what this change will mean in practice. Will the development of new DSpace releases go back to the old "bring us what you have" model? Tim admitted that the planning process for new major versions has not really been planned yet. Nevertheless, the development is likely to be much more controlled than with DSpace 6, but less than with DSpace 7. There will be roadmaps, but a lot depends on the level of funding. There may be a couple of new features per release. On the positive side, there's now a lot more engagement than there used to be, so there's hope that we will get more contributions from the community.

Joanna noted that she has been talking with the management in her own organization on how to manage the expectations and she was curious what would be the best way to bring code from the outside. Tim assured that community contributions are very welcome if they are in line with the road map. This depends on the feature, but if it's of interest to a larger group of community members, it can be incorporated into the official DSpace code base. It was noted that it is useful to start the discussion early to make sure that everything works out as hoped. The best way to share feature requests is to create a ticket in GitHub so that the developers can give feedback on them.

Beate asked whether there are still problems with a shortage of code reviewers. Tim admitted that this is still a big problem, as many of the old reviewers are no longer available, either because they have changed jobs or because they no longer work with DSpace. This is slowing down the development, as it takes time to get especially the larger updates properly reviewed. It would be useful to find ways to encourage new people to become reviewers.

Laurie pointed out that the timeline for DSpace 7.x releases has been very fast, but it will slow down with DSpace 8 so that more people will have a chance to get onboard. Tim predicted that the new major releases may not be as large, perhaps not even as large that 7.5 is.

Beate announced in the chat the Hamburg University of Technology has been awarded a Technical Integration Grant from the ORCID Global Participation Fund. This will be used to improve the ORCID login process in DSpace-CRIS, which may benefit all of the DSpace community. 4Science will be the developer. Susanna considered this a good example of getting outside funding for specific development tasks.

#### **6. DCAT**

Maureen mentioned that Andrea Bollini from 4Science was going to be presenting the DSpace 7 ORCID integration in the February DCAT meeting. Everyone is welcome to join DCAT meetings, which are held on the second Tuesday of each month. Among other things, DCAT has been supplementing the user-facing documentation of DSpace. DCAT is looking for nominations for a new chair. There could be two people serving as chairs as well.

#### **7. Community Event**

Kristi noted that the planning for DSpace community events hasn't started yet. It would be important to establish regular points of contact with the DSpace community. There was a discussion on how to organize this and in which formats the events should be.

Natalie mentioned that there are plans to organize a lightweight Q&A with Tim and Natalie in late March. This should be a good way to get a touch point going. There has also been discussion about a digest or a newsletter.

Isabel suggested that it might be a good idea to organize a DSpace event in connection with the next COAR meeting, which is likely to attract a fairly large amount of Latin American DSpace users. Michele agreed that it would be a good opportunity for organizing a regional DSpace workshop.

Kristi supported this idea, although she has been thinking more about virtual events. These could be a bit less about technology, with more emphasis on what the community is doing and how DSpace is being used in different organizations. There should be a small working group for coordinating things. It was decided that a group consisting of Kristi, Natalie, Isabel, Michele and Susanna will start planning for community events.

#### **8. Open Repositories**

DSpace will be presented in the Repository Rodeo. Some of the Leadership members will be attending the conference.

## 9. Other Business

Beate mentioned that DSpace Praxistreffen will be organized in person in March for the first time since the beginning of the pandemic.

There was some discussion on whether there should be a mechanism for donating smaller amounts of money to DSpace. There was some talk whether it might be possible to have a voluntary participation fee for DSpace events. However, this didn't receive support from the Leadership members as it was argued that this might lead to communication problems.

There was also some talk about the rationale and historical background for the DSpace Development Fund. Erica was looking for arguments that could be used to justify this kind of investment to the management.

Lieven explained that the main reason for setting up the Development Fund was the unusual amount development effort needed for DSpace 7. With DSpace 7 there was a high learning curve before starting the development, as there was a lot of new technology. Because of this 4Science and Atmire had to do a lot of groundwork. Hopefully other developers will do more work on DSpace 8, but it could still be useful to have development funding for this version as well. The DSpace membership fees are used for management and oversight. Specific projects may need additional funds.

Tim echoed this and added that although the current level of funded development can't be maintained indefinitely, we can't go back to the old model. We don't know yet what the DSpace 8 model looks like.