

Abstract

DuraSpace seeks a National Digital Platform Planning Grant for \$49,279 to investigate barriers upgrading hundreds of U.S.-based libraries and archives running unsupported versions of Fedora. Running unsupported software puts at risk the stability, security, and functionality of the content and services they support.

There are approximately 240 libraries and archives in the United States identified as using unsupported versions of Fedora making them target beneficiaries of the deliverables of this project. They include R1, R2, and R3 universities, liberal arts colleges, and not-for-profit special libraries hosted by historical societies and small research institutes.

DuraSpace's proposed one-year planning project, *Designing a Migration Path: Assessing Barriers Upgrading to Fedora 4.x*, will include consultation with an advisory board of stakeholders, conducting an environmental scan of relevant community initiatives, and gathering primary research data to determine what tools and supports are needed for the upgrade path. We can identify the following as deliverables for this proposed planning project:

- Describing a collection of the most common Fedora 3.x - Fedora 4.x upgrade user stories
- Creating an inventory of tools, documentation, and other resources for the upgrade path
- Providing the Islandora, Samvera, and Fedora community governance bodies feedback on the challenges and advantages of working within their communities
- Developing migration path recommendations and prioritizing recommendations on how to reduce barriers to upgrades that will have the greatest impact on US-based libraries and archives built on Fedora.
- Forming an advisory board to facilitate communication and strategic collaboration among stakeholders that may spur future spin off projects such as:
 - Developing tools to map data models at scale for standard front-end applications
 - Generalizing and documenting existing migration tooling
 - Developing a training curriculum on new standards for description and dependencies for Fedora 4.x
 - Assisting the Islandora community with development of its Fedora 4.x front end (Islandora CLAW)

We believe the direct and indirect deliverables from this project will provide resources and support for the hundreds of American libraries and archives using Fedora to underpin the delivery of scholarly publications, research data, cultural heritage, and special collections-related content and services to patrons.