2017-04-05 DSpace Summit Breakout Notes

Date

05 Apr 2017

Attendees

- Tim Donohue
- Valorie Hollister
- Carol Minton Morris
- Michele Mennielli
- Andrea Bollini (4Science)
- Lieven Droogmans
- Kristi Park
- Maureen Walsh
- debra hanken kurtz
- Kenning Arlitsch (Montana State)
- John Herbert (LYRASIS)
- Tuan Pham (Cambridge University)
- Carl Grant (University of Oklahoma)
- David Lewis (remote)
- Jyrki Ilva (remote)

Goals

- Identify and document 2-3 marketing and fundraising activities aimed at generating greater revenue from the

  community beyond the US and Canada

    Create ambassador stipends for member representation at conferences

    Target regional and consortial efforts

    Discuss how RSPs could figure in for mutual benefit
- Promote DSpace 7 new UI - Review outreach activities underway

Notes

- Clarification on Registered Service Providers (RSPs). We've had a least one leave recently. Who are current ones
- DSpace has high reliance on RSPs in general
- Difficulty getting funding in Europe
    - Hard to join a "membership organization" in Europe?
    - Do we need to premier DSpace as a "product" to get more funding?
    - How does OCLC handle/search out funding in Europe?
        - Michele will ask Rebecca Bryant for any info they can provide
    - More engagement at the DuraSpace level in Europe
        - What is the true *value of membership*? What do organizations get besides governance?
        - May need to show/provide services (but ones not in competition with RSPs)
        - Aim to **increase membership** in Europe..this means we need "more clients"
        - **DuraSpace branded events in Europe**
            - Can European events be used to attract more members?
- Monthly meetings with RSPs + DuraSpace
    - Can we ask/require all RSPs provide a certain amount of development back to open source DSpace?
    - DuraSpace may want/need to have more one-on-one meetings with individual RSPs
        - In larger RSP meetings, individual RSPs are less likely to be frank (as they are on the phone with their competitors)
- Possible extra benefits to Membership (besides the vague concept of governance)
    - Added to a DSpace security mailing list. Be notified of security issues immediately (perhaps even before patched), and **before** the issue becomes public on lists, etc.
    - Possible priority bug fixes / patches / features. Members could request certain fixes/features, and RSPs could be required to fix those priority features
- What is the difference between the membership levels? Few reasons to go for "Gold" or "Silver" over Bronze. Need unique benefits at each level.
- Governance alone is NOT ENOUGH to entice most institutions to become members.
    - Training or support would be a good benefit
    - Discounts on workshops or webinars? Or Members get these for free, while other users pay some sort of fee?
- What other services can we provide that may be of interest to members?
    - Possible survey of members and non-members to see what they want/require out of membership?
- Leadership Group & Steering Group make more sense if you can make decisions on priorities / needs / fixes in DSpace. While Leadership /Steering has this role, it's very vague and hard to point at how individual members affect those priorities.
- Membership levels
    - Bronze level membership is already too costly for many
    - Is there a level **below** Bronze that we could create? "Friend of DSpace"?
    - Something in the 500 Euro range? Under 1,000 Euros?

- Other possible benefits for membership
  - 1-2 tickets per year that a member can request be fixed (May be hard to achieve, as tickets are different sizes)
  - Aforementioned private security list
  - RSP discounts or "free" work on specific tickets (How would this work for RSPs though? This may be easier to implement for host services than RSPs)
  - "Tokens" or "votes": Based on level of membership, your institution has a certain number of "tokens" that you can spend (per year) to vote on specific features/tickets to be implemented/resolved. If a feature or ticket passes a minimum threshold (of votes/tokens), then it would be prioritized for the next release (and/or an RSP would be assigned to implement that ticket for all DSpace users).
- Membership vs RSP work. Why buy membership if I can just hire an RSP to fix things in my own repo?
  - Membership benefits are all about the long term. E.g. if you had tokens/votes to help prioritize features, it helps with a long term need. If the code goes back into the open source software it also benefits your local institution (as it makes future upgrades easier, less local custom code)
  - RSPs sell features that meet short term needs. You can quickly buy a specific feature only provided by a specific RSP, and it'll meet your immediate need. But, long term, it may also complicate future upgrades and/or you become more reliant on that RSP (or their features).
- DuraSpace should investigate providing services via partnership with RSPs (e.g. DSpaceDirect via RSPs)
- Summary of first hour:
  - Need to revisit / clarify membership benefits. Some possibilities:
    - Security notification list
    - Event / webinar discounts (or free for members)
    - Discounted RSP support hours?
    - Tokens with which to vote on specific tickets. Those that pass a minimum threshold are prioritized for next relese. Tokens would need an expiration date (perhaps one year)
    - Training or support discounts?
  - Bronze membership may be too costly
    - Need a level below it. 500-1,000 Euro. Friend of DSpace? Some less valuable metal?
  - Review & survey community on Membership & Governance model
    - What works and what doesn't?
    - What do they want out of membership? What would entice them to join?
  - Revise Registered Service Provider contract (with DuraSpace)
    - Require contributing code back to open source community (or additional $$ beyond base fees?)
    - Revenue and/or hours given back as well
    - Annual review of RSPs
    - Two levels/tiers of RSPs?
    - Include a requirement to close specific (high priority) tickets which are voted on by members? Or some level of development is required based on contract
- DSpace.org (and similar) should have a link to "donate" $$ at all the various locations where you can download the software and/or read the documentation
- Side Conversation: Higher level strategic directions. What are we doing here?
  - What is the value of thousands of repositories worldwide instead of just one hosted solution?
  - What is the impact of repositories on my users/researchers/scholarship?
  - What not do this all together (i.e. one solution cross DSpace, Fedora, Hydra, etc)
  - These questions were brought up during CNI...mentioned again here
  - COAR report on institutional repositories. Local repositories are more distributed, whereas a single centralized repository could be "bought" (or there's the risk of that). Though DuraSpace could protect against such risk
  - Even if the "one repository" was possible, could we actually get all these institutions to **agree** on platform, metadata standards, preservation strategies, etc. Seems unlikely
  - Perhaps these sorts of higher level strategic discussions would be worth spending more time on during future DuraSpace Member Summit Meetings?
  - Would be nice to have the Summit be a 1/2 day to a day longer, and allow time for these broader discussions to arise (cross project).
    - DuraSpace could sit back and simply facilitate the discussion and listen more to its members
    - Summit could be more about establishing the higher level strategic direction of DuraSpace (and it's products/projects & services)
    - Then smaller meetings could take place per project (e.g. user groups around the world) which can take a cue from this strategic direction.
- DSpace 7 Updates & Needs
  - 4 main institutions contributing at this time... Atmire & Texas A&M (Angular UI), 4Science & Georgetown (REST API)
  - Could use more developers. The early work has been establishing a process, best practices, etc. We anticipate that more folks can get involved more easily in the near future
  - Angular UI workshop & demo at OR2017
  - Would be nice to have regional workshops / training sessions
    - E.g. Georgetown may hold a user group in the fall. Could do some training/updates there potentially?
    - Opportunities for others to sponsor such workshops. Also could be a non-member fee (or a member discount) to provide a small amount of funding back to the project?

Action items

- Revisit Membership benefits. Can we define/provide more tangible benefits that will entice further members?
- Possible survey on membership / governance to members & non-members. What works and what doesn't? What do they want out of membership (what would entice them to join)?
- Revisit Registered Service Provider contract (with DuraSpace). Can we require that all RSPs contribute back open source code to DSpace alongside revenue sharing / fixed fees? Perhaps an annual review of RSPs?
- DSpace.org should have a link to "Donate to DSpace" on the page where you download software / find docs