



2015 Annual Report

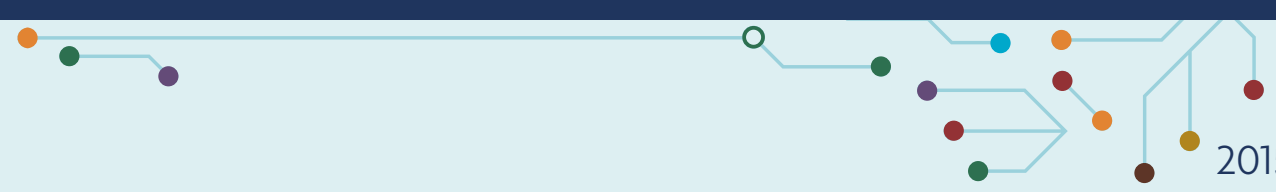
EDUCOPIA
INSTITUTE

From ACT to IMPACT



Libraries, archives and museums (LAMs) are not luxuries for the privileged.

They are vital to the health and success of our nation and world.



2015 reminded us that when LAMs stand together, we amplify that message

That when LAMs plan together,
we reinforce each other's successes

That when LAMs work together,
we magnify the impact of our investments

That when LAMs consciously focus on the health of the field,
as well as the health of their own institutions,
transformational change becomes possible

That we're capable of incredible things together:

From **ACT** to **IMPACT**

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Message from the Executive Director



Educopia’s premise is clear-cut: modest facilitation helps communities thrive, and thriving communities have ripple effects, impacting their professions and society as a whole.

2015 has illustrated the effectiveness of this model, in terms of action and impact across the Library, Archives, and Museum sectors (LAMs).

This year, Educopia has provided an administrative home to three communities—MetaArchive Cooperative, a digital preservation network that serves over 50 LAM members in four countries; the Library Publishing Coalition, a membership organization supporting library publishing and scholarly communications activities; and the BitCurator Consortium, a membership association that researches, develops, and supports digital forensics practices across LAMs. Our work with these groups has included community building and network management, as well as a broad range of administrative, legal, and financial services. We have not “directed” these communities or done their work for them; rather, these self-governing communities have owned and controlled the outputs of their collaborative work.

To complement these communities, our Educopia Research division has worked with more than 80 organizations to tackle cross-sector challenges this year. Through our IMLS-supported Mapping the Landscapes and Nexus LAB projects, and our facilitation work with the Coalition to Advance Learning,

we’ve helped to strengthen continuing education and professional development for LAMs in partnership with over 40 professional associations spanning state agency, nonprofit, and academic LAMs. To foster digital news preservation practices, our NEH-supported Chronicles II project and our partnership with Reynolds Journalism Institute’s Dodging the Memory Hole efforts have fused more than 60 partners into a new preservation community, spanning journalists, newspaper owners, news repository service providers, technologists, librarians, archivists, and faculty and administrators. To address critical issues in data preservation, we have worked with eleven universities to better understand and address the complexities of preserving student research outputs in the IMLS-funded ETDplus project. And building from my own participation in the 2015 Scholarly Communications Institute, Educopia has helped to form and incubate a team of representatives from presses, data aggregators, and usage-data analysts to explore privacy and ethics issues around monograph usage data.



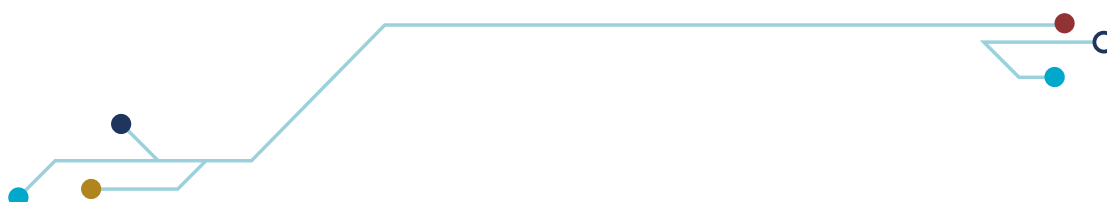
The Educopia Institute’s mission is to build networks and collaborative communities to help cultural, scientific, and scholarly institutions achieve greater impact.

In all of our 2015 work, my staff and I have used our nimble, effective staffing structure to empower LAMs to build together, and to embed their resulting knowledge and infrastructure locally to strengthen their own institutions and professions. We do so because we believe system-level change has to be driven, owned, and internalized directly by community stakeholders.

At the close of 2015, I’m so grateful for our many partners and members who have invested in connecting and collaborating across institutional and sector-based boundaries. As we enter our second decade of work in 2016, we will continue to depend upon your vision, passion, and engagement as we work together to inspire and produce broad-scale impact across LAM environments.

Katherine Skinner, Executive Director





Community

BITCURATOR CONSORTIUM

British Library
Duke University
Emory University
Gates Foundation
Harvard University
McMaster University
Massachusetts Institute of Technology
New York Public Library
New York University
Northwestern University
Penn State
Princeton University
Stanford University
Texas State Library and Archives Commission
University of North Carolina–Chapel Hill: School of Information and Library Science
University of Colorado, Boulder
University of Manchester
University of Maryland
University of Maryland, College Park: Maryland Institute for Technology in the Humanities
University of Melbourne Library, Research & Collections
University of Virginia
Yale University

METAARCHIVE COOPERATIVE

Auburn University
Boston College
California Polytechnic State University
San Luis Obispo
Carnegie Mellon University
Clemson University
Consorti de Biblioteques Universitaries de Catalunya
Florida State University
Greene County Public Library
Historically Black Colleges and Universities Library Alliance
Indiana State University
Isabella Stewart Gardner Museum
Oregon State University
Penn State University

Pontificia Universidade Católica do Rio de Janeiro
Purdue University
Rockefeller Archive Center
University of Louisville
University of South Carolina
University of North Texas
University of Tennessee - Knoxville
Virginia Tech University

LIBRARY PUBLISHING COALITION

Australian National University
Boston College
Brigham Young University
California Digital Library
California Polytechnic State University
San Luis Obispo
Carnegie Mellon University
Claremont University Consortium
Colby College
Dartmouth College
DePaul University
Emory University
Florida State University
George Mason University
Grand Valley State University
Illinois Wesleyan University
Indiana University
Iowa State University
Kansas State University
Lynn University
Macalester College
McGill University
Northeastern University
Northwestern University
Ohio State University
Oregon State University
Pacific University
Penn State
Pepperdine University
Purdue University
Rutgers University
Simon Fraser University

Southern Illinois University
SUNY College of Environmental Science and Forestry
SUNY Geneseo
Syracuse University
Temple University
Tulane University
University of Arizona
University of Central Florida
University of Florida
University of Georgia
University of Illinois at Urbana-Champaign
University of Iowa
University of Kentucky
University of Maryland
University of Massachusetts Amherst
University of Massachusetts Medical School
University of Michigan, Ann Arbor
University of Minnesota
University of North Carolina, Charlotte
University of North Texas
University of Pittsburgh
University of Queensland
University of San Diego
University of South Florida
University of Tennessee
University of Utah
University of Washington
University of Windsor
Valparaiso University
Villanova University
Virginia Tech University
Wake Forest University
Washington University Libraries
Wayne State University
West Virginia University

EDUCOPIA RESEARCH

Academy of Certified Archivists
ALA/SAA/AAM Committee on Archives, Libraries, and Museums (CALM)
American Association for State and Local History

Educopia serves as a cross-sector community catalyst and neutral host site for the collaborative undertakings of libraries, archives, and museums. Our small staff of facilitators has the pleasure of working with colleagues around the world to accomplish the goals set in our affiliated communities and research projects.

As such, the wide range of partners with whom we work deserve the accolades for the projects we undertake together. We thank all of the following institutions for their crucial leadership, vision, and hard work in 2015.

American Libraries Association, Public Program Office
Archives Leadership Institute
Association for Information Science and Technology
Association for Library Collections and Technical Services
Association of Academic Health Science Libraries
Association of Academic Museums and Galleries
Association of Children’s Museums
Association of College and Research Libraries
Association of Midwest Museums
Association of Research Libraries
Association of Science-Technology Centers
Association of Southeastern Research Libraries
Association of Zoos and Aquariums
bepress
Califa
Carnegie Mellon University
Center for Creative Leadership
Chief Officers of State Library Agencies
Colorado State University
Confederation of Open Access Repositories
Conservation Center for Art & Historic Artifacts
Council of State Archivists
Council on Library and Information Resources
Dallas Morning News
Dartmouth College
Digital Preservation Management Workshop
Foundation of the American Institute for Conservation of Historic and Artistic Works
Getty Leadership Institute
Greene County Public Library
Hagley Museum and Library
Heritage Preservation
Illinois State Library - ILEAD U
Indiana State University
InfoPeople
Internet Archive

Institute for Cultural Entrepreneurship
Ithaka S+R
Medical Library Association
Kentucky Press Association
Library Information Technology Association (LITA)
Lynchburg College
Lyrasis
Maureen Sullivan Associates
Johns Hopkins Museum Studies Program
Kentucky Department for Libraries and Archives
Mid-Atlantic Association of Museums
Mid-Atlantic Regional Archives Conference
Midwest Archives Conference
Morehouse School of Medicine
Mountain-Plains Museums Association
National Association of Government Archives and Records Administrators (NAGARA)
National Library of Medicine
New England Museum Association (NEMA)
New Media Consortium
North American Serials Interest Group (NASIG)
Northeast Document Conservation Center (NEDCC)
Online Computer Library Center (OCLC)
Oregon State University
Penn State University
ProQuest
Public Knowledge Project (PKP) School
Public Library Association (PLA)
Pueblo City-County Library District
Purdue University
Regional Archival Associations Consortium (RAAC)
Society of American Archivists (SAA)
Southeastern Museum Conference (SEMC)
The Bishoff Group LLC
TrueBearing Consulting
University of Delaware
University of Houston
University of Kentucky
University of Louisville

University of Missouri, School of Journalism
University of North Carolina - Chapel Hill, School of Information and Library Science
University of North Texas
University of Tennessee, Knoxville
Urban Libraries Council
Virginia Association of Museums
Virginia Tech Libraries
Virginia Tech University

SPONSORS

Association of American University Presses
bepress
Bookmasters
Cambria Press
CrossRef
Editage
EZID
Institute for Museum and Library Services
National Endowment for the Humanities
Scholastica
Society for Scholarly Publishing
Tizra
Ubiquity Press

BOARD OF DIRECTORS

Martin Halbert, Board President
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Tyler Walters, Board Treasurer
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Greg Crane, Board Member At Large

STAFF

Katherine Skinner, Executive Director
Christina Drummond, Director of Strategic Initiatives
Sarah Lippincott, Program Director
Sam Meister, Preservation Communities Manager
Courtney Vukasinovic, Administrative Coordinator
Matt Schultz, MetaArchive Cooperative Program Manager (*departed 07/2015*)
Nick Krabbenhoef, Project Manager (*departed 11/2015*)

2015 By the Numbers

144
member institutions
within our three Affiliated Communities
representing six countries.

\$210,000
in awards and subcontracts
for new grant-funded research.

700 digital collections preserved
for more than 50 organizations through our work with MetaArchive,
including 316 new collections in 2015. Learn more at metaarchive.org.

ACT to IMPACT

31 presentations
including eight keynotes
at conferences and events
around the world.

84 research partners
working together on complex LAM issues.

5 active research projects
including two that began in 2015.

3 Educopia publications
*LAM Needs Assessments, Spanning
Boundaries*, and *U.S. Digital Preservation
Collaborations from 1994-2014* which can be
downloaded from educopia.org. Educopia
published an additional four articles and
chapters including “Taking Action in a
Critical Moment” featured in *Serials Review*.

734+
attendees
at two workshops, three
additional events and 11 meet-ups
hosted by Educopia in 2015.

3 communities with reduced costs
for operational and administrative expenses through
resource and infrastructure sharing.

3,000+
informed of critical
considerations for multi-sector
collaborative efforts through
Educopia Publications.

70 organizations
sharing digital news preservation knowledge.

3 sectors (libraries,
archives, and museums)
building continuing education and professional
development partnerships, aligning interests
to improve the skills and knowledge of our
21st century information workforce.

1 elevated profile
for systems-change methodologies
such as “Collective Impact,” through
direct facilitation and high-profile
presentations in venues like Force 11
and the Charleson Conference.

2015 Financials

Educopia Institute’s revenues and expenditures are differentiated internally according to two main classifications: 1) Affiliated Communities (hosted community networks, e.g., MetaArchive Cooperative, Library Publishing Coalition, and BitCurator Consortium), and 2) Educopia Research (research efforts funded primarily through grants and contracts).

Each Educopia-based **Affiliated Community** is self-supported through diversified revenue streams. Once a community is established, its membership, service, and event revenues cover 100% of that community’s staff, travel, and associated overhead costs. We work with each Affiliated Community to maintain and manage its own budget, resources, and operating reserve.

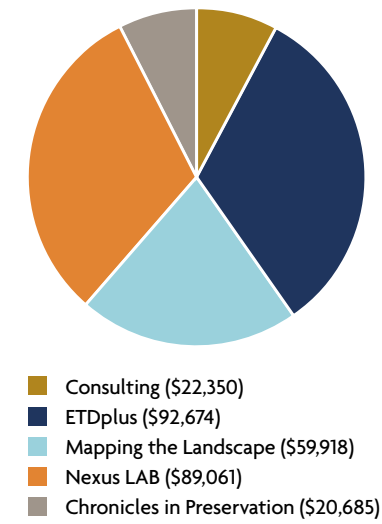
By contrast, the **Educopia Research** program leverages grant, contract, and consulting revenue to scale Educopia’s staff to undertake new initiatives, incubate budding community efforts, and contribute important research and development to the broader LAM environment. Educopia Research initiatives are structured as community partnerships, with work subcontracted out to project partners whenever feasible.

In fiscal years 2014 and 2015, Educopia began making significant infrastructure investments, totaling \$62,000, to scale up support services for multiple affiliated communities. The resulting infrastructure provides economies of scale for all of Educopia’s affiliated communities and projects, reducing costs for: accounting, administration, web-based communications, and contact relationship management.

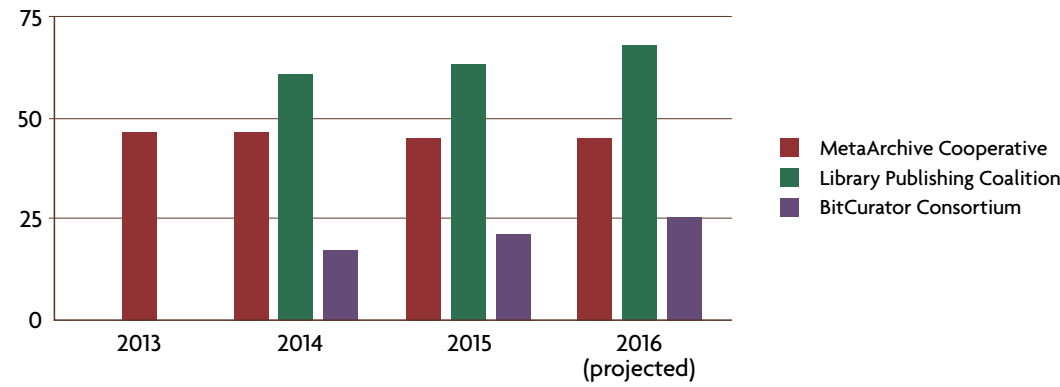
2015 EDUCOPIA INSTITUTE PROFIT & LOSS STATEMENT (UNAUDITED)

Income	
Membership	\$ 254,925
Reimbursements	\$ 60,000
Events	\$ 40,815
Program Service Fees	\$ 8,271
Consulting	\$ 22,350
Grants	\$ 268,193
Investment	\$ 2,023
Expense	
Personnel	\$ 381,412
Professional Services	\$ 155,199
Office and General	\$ 22,439
Overhead Allocation	\$ 60,000
Events	\$ 47,803
Travel	\$ 49,632
Net	\$ (59,904)

EDUCOPIA RESEARCH 2016



Each Affiliated Community is stable and/or growing through 2016, as evidenced by membership trend data from the last three years.



2015 Activities – Affiliated Communities



The Educopia Institute strengthens community networks by providing collaborative infrastructure, facilitating the vital connections and relationships that help work get done. We do this both on a project basis, and through multi-year, formalized partnerships.

The Educopia Institute provides a suite of high-impact hosting services for Affiliated Communities across a spectrum of organizational development. The crucial scaffolding we offer to these collaborative efforts, including expert staffing and technical infrastructure, helps to transform community action into collective impact. Educopia’s services couple community-building, organizational development, and network facilitation expertise, with the broad range of administrative, legal, and financial support services often required by pre-501c3 initiatives.



MetaArchive is a community of preservationists from libraries, archives, and museums with more than a decade of experience in digital preservation. This international network is governed by its members, who maintain both ownership and control of the preservation network and all of the content it contains. Members work together with the intent to reduce the costs of digital preservation, not just for themselves, but for the many libraries, archives, and museums with vibrant digital collections and strained budgets. This community consistently lowers the financial and technical barriers to state-of-the-art digital preservation in order to support a broad range of institutional types and sizes with effective and proven preservation solutions.

In 2015, members celebrated MetaArchive’s first decade by reflecting on their efforts to date and actively planning for MetaArchive’s future strategic development.

MetaArchive’s mission remains unchanged since 2004—partners remain fiercely committed to practicing



principles of cooperative, member-governed action; distributed digital preservation; and transparency in policies, procedures, and pricing. The cooperative’s 2015 accomplishments include the welcoming of its first museum member; significantly reducing network operational costs and storage fees (now \$500/TB/year); publishing a “20 cost questions” guide to assist institutions with the comparative analysis of digital preservation solutions; and producing a set of genre-based studies of the preservation of digital art, digital news, and electronic theses and dissertations (ETD) collections. In 2015, we also ingested 316 new collections, made ease-of-ingest improvements using our BagIt-based pathway, and reinforced the security of our network infrastructure.



Today, more than 90% of our public and private records—from the news to literary archives, scientific discoveries to architectural plans—originate as digital files. The stabilization and preservation of these critical “born-digital” collections to ensure that they are authentic, reliable, and complete is the core goal of the BitCurator Consortium (BCC).

Celebrating its first anniversary in 2015, BCC and its member institutions are passionately and practically engaged in digital forensics. The BCC sustains the BitCurator software, shares and develops born-digital workflows, and promotes the general adoption of digital forensics practices across libraries, archives, and museums. To help ensure the longevity and reliability of the cultural, scientific, and historical record, the BCC addresses articulated community needs around digital forensics training, software research and development, documentation, and systems integration and automation.

In 2015, the BCC produced and launched a range of member services, including a dedicated help desk, a scripts library, curation workflows documentation, and a professional training series, in addition to hosting the first annual BitCurator Users Forum. Members also implemented a community-based governance structure and hired the BCC’s first Program Manager to facilitate and support community activities.



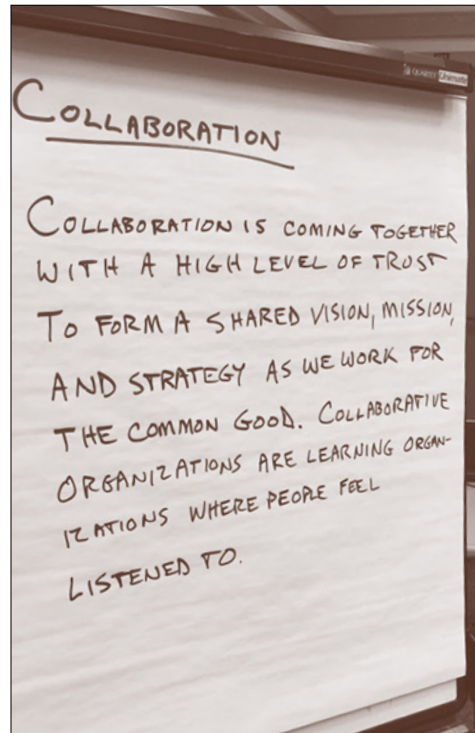
The web, information and social media technologies, and the Open Source and Open Access movements have changed the framework in which scholarship is created, collected, organized, and disseminated. As one result of this paradigm shift, hundreds of academic and research libraries now engage in publishing activities. The Library Publishing Coalition (LPC) fosters collaboration, knowledge-sharing, and the development of common practices for library publishers.

2015 marks a milestone year for the LPC’s organizational growth. The organization completed the transition it began in 2013, evolving from a seed-funded start-up of institutions with shared interests into a full-fledged membership organization. Now, more than 60 organizations work together through the Coalition.

The LPC continues to foster knowledge-sharing across its membership and beyond. The second annual Library Publishing Forum at Portland State University attracted an international audience of nearly 150 librarians, university press staff, and other scholarly communication professionals. LPC members also hosted eight conference “meet-ups” and two webinars, planned a six-webinar series for 2016, conducted a professional development needs survey, established a weekly jobs digest, and launched an annual award program for outstanding scholarship in library publishing.

2015 Activities – Educopia Research

Together Educopia partners and staff catalyze large-scale change through state-of-the-field studies and focused action around three broad research areas: Digital Preservation, Scholarly Communications, and Cross-Sector Collaboration between libraries, archives, and museums. Projects explore community-specific solutions that strengthen capacity, and identify cross-sector trends and developing practices that can be translated for impact.



Together, Educopia partners and staff seek to catalyze large-scale change through state-of-the-field studies and focused action plans.

STRENGTHENING CROSS-SECTOR CULTURAL COLLABORATION

Building upon momentum from a 2013 IMLS gathering, Educopia brought together diverse teams of library, archives, and museum professional associations and service providers to pursue efforts that benefit all three sectors. In 2015, two projects funded by the Institute for Museum and Library Services (IMLS) focused on the area of Continuing Education and Professional Development (CE/PD).

Nexus: Leading Across Boundaries (LAB)

To strengthen leadership development across museums, archives, and libraries, Educopia is leading a team of 31 partners to develop open resources to facilitate evaluation and planning activities. In 2015, the project team, working with the Center for Creative Leadership (CCL), developed draft crosswalk frameworks indicating common leadership competencies and their related broader impacts across six professional career levels. Building upon these frameworks, partners launched the development of a suite of leadership development impact evaluation tools in conjunction with TrueBearing Consulting. Partners also brought on Toolkit Consulting to begin developing curricular resources to support programs targeting those who lead at a field or profession level. Through the project this year, 21 LAM leadership development providers were also exposed to state-of-the-art leadership training techniques through in-person and virtual sessions with CCL.

2015 highlights include:

- Drafting of Design Frameworks that crosswalk common leadership competencies and their related impacts across six professional career levels
- Co-facilitation of an in-person meeting for LAM leadership development providers at the Center for Creative Leadership (CCL) headquarters in Greensboro, NC

Mapping the Landscapes

In service to the Coalition to Advance Learning in Archives, Libraries, and Museums, Educopia administers and manages the partner driven *Mapping the Landscapes* project, which is conducting a CE/PD needs assessment across libraries, archives, and museums. In 2015, this IMLS-funded project's team of 37 professional and service organizations documented both the cross-field perceptions that collaboration leaders must manage, and the best practices for assessing CE/PD needs at individual, organizational, and field levels. This research set the stage for the project's nationwide individual CE/PD needs data collection effort, which will launch in 2016. The focus group and survey efforts, led by LYRASIS and TrueBearing Consulting respectively, were designed to provide an ongoing, sustainable mechanism for a cross-sector cadre of CE/PD providers to view and understand their shared and unique CE/PD needs across fields.

2015 highlights include

- More than 50 individuals participated directly in *Mapping the Landscapes* focus groups held at Archives 2015 and the American Association for State and Local History (AASLH) Annual Meeting.
- The survey task force completed a Survey Conceptual Framework for LAM-wide individual-level needs assessment
- The team produced and published *Spanning Our Field Boundaries: Mindfully Managing LAM Collaborations* (published October 2015, downloaded 178 times in 2015) and *LAM Education Needs Assessments: Bridging the Gaps* (published November 2015, downloaded 49 times in 2015).



BROADENING DIGITAL PRESERVATION IMPACTS

Informed by the work of the MetaArchive Cooperative and the BitCurator Consortium, Educopia pursues projects to expand the accessibility of digital preservation across institution types and content genres. Supported by federal research grants and project-based consulting in 2015, Educopia staff facilitated research teams that explored ways to improve capacity across preservation-related processes such as versioning, ingest, storage distribution, data exchange, and preservation advocacy. Research efforts documented preservation challenges and opportunities within born-digital news, digital art, data, and electronic theses and dissertations.

Chronicles in Preservation II

To improve preservation practices for born digital news, Educopia staff bridged stakeholder groups that had not previously understood their interconnected roles in digital curation and digital preservation. In the National Endowment for the Humanities (NEH)-funded *Chronicles in Preservation II* project, Educopia planned and hosted the *Dodging the Memory Hole* Action Assembly with partners including the Reynolds Journalism Institute (RJI) and the Charlotte Mecklenburg Public Library. Educopia enabled diverse stakeholders (journalists and editors, newspaper owners and repository system vendors, librarians and archivists, students and scholars, technologists and data analysts) to gather, develop, and commit to action plans addressing a range of born-digital news preservation challenges. Educopia also partnered with the RJI to help this nascent news preservation community to launch its communications plan through www.savenews.org.

Educopia staff also facilitated a state-based survey of digital news collection preservation activities in partnership with the State Library of North Carolina, the University of North Carolina at Chapel Hill, North Carolina State University, Wake Forest University, and the North Carolina State Archives, laying the groundwork for future state-based analysis.

2015 highlights include

- The NC-based workteam conducted a statewide survey of digital news storage and preservation practices, publishing the findings in *Scanning the Environment: North Carolina Born-Digital News Preservation Practices 2015* (December 2015).
- In partnership with Reynolds Journalism Institute, the project team hosted the *Dodging the Memory Hole II Action Assembly* in Charlotte, NC, engaging more than 70 attendees in digital preservation action.



ETDplus: Preserving Research Data and Supplementary Files

Sharing the knowledge gained through research is paramount to Educopia, as evidenced by staff communicating findings in-person and online, across presentations, trainings, and publications. Support from IMLS enabled our ETDplus project team to develop guidance documentation to help graduate schools and libraries address the submission and curation of “beyond the pdf” dissertation and thesis components. Over 320 people increased their knowledge of electronic theses and dissertation preservation policies and practices through workshops hosted by Educopia at the Networked Digital Library of Theses and Dissertations (NDLTD) 2015 meeting and the United States Electronic Dissertation Association (USETDA) 2015 meeting.

2015 highlights include

- Produced guidance documentation to help graduate schools and libraries address the submission and curation of supplemental and/or “beyond the pdf” dissertation and thesis components
- Partnered with Virginia Tech to prototype a system that streamlines the submission, curation, and preservation process for supplemental electronic thesis and dissertation file objects such as research data sets, digital art, websites, software code, and musical performance audio and video
- Hosted workshops at the NDLTD 2015 conference in India and the USETDA 2015 conference in Texas to train more than 320 people in ETD preservation policies and practices

ADVANCING SCHOLARLY COMMUNICATION

Educopia staff continue exploring mechanisms for bridging diverse scholarly communication stakeholder communities, including university presses, data aggregators, authors, readers, libraries, and research centers. Through incubating project ideas, and participation in Force11, the Research Data Alliance, and the Scholarly Communication Institute 2015, we collaborated with a range of players to rethink the structures necessary for advancing 21st century scholarly communications. Our Scholarly Communications work in 2015 has focused on incubating two project concepts, exploring their viability for longer-term efforts.

Chrysalis: Coerced Migration Research Alliance

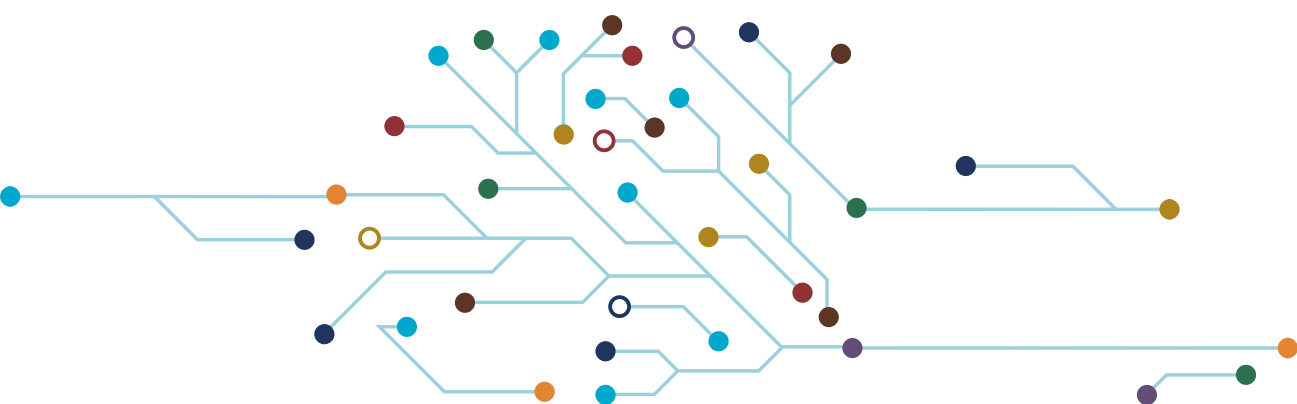
Through focused explorations with cross-sector thought leaders, Educopia facilitated conversations in 2015 to evaluate models and vet potential pilots. Planning conversations for a Coerced Migration Research Alliance engaged scholars, librarians, and data center administrators in exploring the utility of vertical (research domain) alignment strategies for born digital publishing capacity and sustainability.

Publishing Analytics Data Alliance

Building on a project concept that originated at SCI2015, Educopia facilitated conversations with publishers, librarians, and scholars about developing guidelines and standards for digital scholarly monograph usage data, and constructing a neutral organizational apparatus for the ongoing collection and aggregation of scholarly publication usage datas.



In Conclusion



Thanks to all of our partners, collaborators, and communities for engaging deeply to address systemic and cross-sector issues facing libraries, archives, and museums.

Together, we are shifting ...

From **ACT** to **IMPACT**

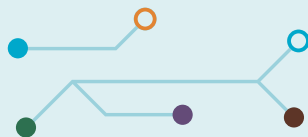
Staff Portraits



Clockwise from top: Christina Drummond, Katherine Skinner, Sarah Lippincott, Courtney Vukasinovic, and Sam Meister.



EDUCOPIA INSTITUTE



www.educopia.org