

collaborate converge create
evolve communicate
here convene
coalesce consult
coordinate generate
combine collate
connect commit
operate

With others,
you can accomplish
what you cannot do alone.

2017 Annual Report

EDUCOPIA
INSTITUTE
Community Cultivators



Together, we're capable of incredible things.

At Educopia, we believe in the power of **connection, collaboration, and co-creation**. Spanning boundaries, sectors, and fields, we use Educopia's community cultivation model to unite people and institutions around shared challenges in digital preservation, scholarly communications, and continuing education. We help organizations work collectively to ensure knowledge is sustainably produced, widely shared, and preserved.



In 2017, our nimble, six-person team facilitated community-driven activities reaching across more than 220 institutions on four continents, including libraries, archives, museums, and publishers across the academic, commercial, government, and nonprofit sectors.

In our work this year, we provided administrative and technical scaffolding to support and strengthen the efforts of five networks (BitCurator Consortium, Library Publishing Coalition, MetaArchive Cooperative, Software Preservation Network, and the Coalition to Advance Learning). We also helped each of these groups with ongoing refinement and calibration of governance, business planning, communications, and technical operations, and we supported their research and development needs through six grant-funded projects.

In these pages, we chronicle the highlights of our year, from directing strategic planning efforts to facilitating convenings, and from conducting environmental scans and needs assessments to analyzing digital curation workflows.

All of us at Educopia are so grateful to the many collaborative partners, community members, project liaisons, funders, and friends who make possible the work we do. As we celebrate our collective 2017 accomplishments, we also look forward to our continued work together with you all.

A handwritten signature in black ink, reading "Katherine Skinner".

Katherine Skinner, Executive Director

community: good things happen to those who collaborate.

Collaboration is the core of our enterprise. We want to call attention to our many institutional and individual partners in 2017. Our small staff serves to facilitate the work of this extended community of players in order to accomplish the massive goals we set together in our affiliated communities and research projects. YOU are the ones who make this work happen, and we are so grateful for your crucial leadership, vision, and hard work.

Library Publishing Coalition

Boston College
California Digital Library
California Polytechnic State University
Carnegie Mellon University
Claremont University Consortium
Colby College
Columbia University
Dartmouth College
DePaul University
Emory University
Florida State University
George Mason University
Grand Valley State University
Illinois Wesleyan University
Indiana University
Indiana University-Purdue University
Indianapolis
Iowa State University
James Madison University
Kansas State University
La Trobe University
Library of Congress
Lynn University
Macalester College
McGill University
Minitex
Northeastern University
Northwestern University
Ohio State University
Oregon State University
Pacific University
Penn State University
Pepperdine University
Portland State University
Purdue University

Rutgers University
Simon Fraser University
Syracuse University
Temple University
Texas Tech University
Tulane University
University College
London (UCL)
University of Alberta
University of Arizona
University of Cincinnati
University of Florida
University of Georgia
University of Illinois
University of Iowa
University of Kentucky
University of Maryland
University of Massachusetts Amherst
University of Massachusetts Medical School
University of Miami
University of Michigan - Ann Arbor
University of Minnesota
University of New Brunswick
University of North Carolina at Charlotte
University of North Texas
University of Pittsburgh
University of San Diego
University of South Florida
University of Tennessee
University of Texas at Arlington
University of Virginia
University of Washington
Valparaiso University
Villanova University
Virginia Tech
Wake Forest University



Washington University
Wayne State University
West Virginia University

MetaArchive Cooperative

Auburn University Libraries
Boston College Libraries
California Polytechnic State University
Carnegie Mellon University
Consorti de Serveis Universitaris
de Catalunya
Florida State University
Greene County Public Library
HBCU Library Alliance
Indiana State University Library
InDiPres
Isabella Stewart Gardner Museum
Ohio University
Oregon State University
Penn State University Libraries
Pontifícia Universidade Católica
do Rio de Janeiro
Purdue University Libraries
Rockefeller Archive Center



University of Louisville Libraries
University of North Texas Libraries
University of South Carolina
Virginia Tech University Libraries
Williams College Libraries

BitCurator Consortium

British Library
Canadian Centre for Architecture
Cornell University
Duke University
Emory University
Gates Archive
Harvard University Libraries
Library of Congress
Maryland Institute for Technology
in the Humanities
McMaster University
Massachusetts Institute of Technology (MIT)
New York Public Library
New York University
Northwestern University Library
Penn State University Libraries
Princeton University
Purdue University Libraries
Rockefeller Archive Center
Stanford University
UCLA Libraries
University of Colorado, Boulder
University of Manchester Library
University of Maryland Libraries
University of Melbourne Library,
Research & Collections
University of North Carolina
at Chapel Hill: SILS
University of Virginia Library
Yale University Libraries

SPN Current Organizations represented by active members

California Polytechnic State University
Canadian Centre for Architecture

Carnegie Mellon University
Computer History Museum
Council for Library and
Information Resources
Emory University
George Washington University
Georgia Tech
Guggenheim Museum
Harvard University
Harvard/Smithsonian
Center for Astrophysics
Library of Congress
Living Computers: Museums + Labs
Massachusetts Institute of Technology
McGill University
Microsoft Archives
New York Public Library
New York University
The Ohio State University
Sasaki
Software Sustainability Institute
Stanford University
StudioGang
University of Arizona
University of California, San Diego
University of North Carolina at Chapel Hill
University of North Dakota
University of Toronto
University of Virginia
Yale University

Educopia Research

Academy of Certified Archivists (ACA)
American Library Association (ALA)
ALA/SAA/AAM Committee on Archives,
Libraries, and Museums (CALM)
American Association for State and Local
History (AASLH)
American Institute for Conservation of
Historic and Artistic Works (AIC)
American University
Archivematica
Archives Leadership Institute (ALI)

ArchivesSpace
Artefactual, Inc.
Association for Information Science and
Technology (ASIS&T)
Association for Library Collections and
Technical Services, (ALCTS)
Association of Academic Health Science
Libraries (AAHSL)
Association of Academic Museums and
Galleries (AAMG)
Association of Children's Museums (ACM)
Association of College and Research
Libraries (ACRL)
Association of Midwest Museums (AMM)
Association of Research Libraries (ARL)
Association of Science-Technology Centers
(ASTC)
Association of Southeastern Research
Libraries (ASERL)
Association of University Presses (AUP)
Association of Zoos and Aquariums (AZA)
Atlanta University Center
bepress
BlueSky to BluePrint
Califa
California Digital Library
California Polytechnic State University
Carnegie Mellon University
Center for Creative Leadership (CCL)
Chief Officers of State Library Agencies
(COSLA)
Confederation of Open Access Research
Cooperstown Graduate Program
Council of State Archivists (CoSA)
Council on Library and Information
Resources (CLIR)
Curtin University
Digital Public Library of America (DPLA)
District of Columbia Public Library
Duke University
Emory University
Georgia Tech
Getty Leadership Institute
Guggenheim Museum



Illinois State Library
 Indiana State University
 InfoPeople
 Institute for Cultural Entrepreneurship (ICE)
 Internet Archive
 Ithaka S&R
 Johns Hopkins Museum Studies Program
 Kansas Historical Society
 Knowledge Unlatched
 Library Information Technology Association (LITA)
 Library Leadership & Management Association (LLAMA)
 Living Computers: Museums + Labs
 Lyndhurst Group, LLC
 LYRASIS
 Mason Publishing/George Mason University Press
 Massachusetts Institute of Technology (MIT)
 Maureen Sullivan Associates
 Medical Library Association (MLA)
 Mid-Atlantic Association of Museums (MAAM)
 Mid-Atlantic Regional Archives Conference (MARAC)
 Midwest Archives Conference (MAC)
 Morehouse College
 Mount Holyoke College
 Mountain-Plains Museums Association (MPMA)
 National Association for Interpretation (NAI)
 National Association of Government Archives and Records Administrators (NAGARA)
 National Library of Medicine (NLM)
 New England Museum Association (NEMA)
 New Media Consortium
 New York Public Library
 New York University
 North American Serials Interest Group (NASIG)
 Northeast Document Conservation Center (NEDCC)

OCLC Research
 Odum Institute
 Online Computer Library Center (OCLC)
 Open Library of the Humanities
 OpenSLX
 Oregon State University
 Pacific University
 Penn State University
 ProQuest
 Public Knowledge Project (PKP)
 Public Library Association (PLA)
 Purdue University
 Regional Archival Associations Consortium (RAAC)
 Rice University
 Simon Fraser University
 Society of American Archivists (SAA)
 Society of Scholarly Publishers (SSP)
 Southeastern Museums Conference (SEMC)
 St. Mary's College of Maryland
 Stanford University
 Stanford University Press
 Syracuse University
 Temple University Press
 Toolkit Consulting
 TrueBearing Consulting
 University of Arizona
 University of Florida
 University of Illinois at Urbana-Champaign
 University of Louisville
 University of Massachusetts Amherst
 University of Michigan
 University of North Carolina at Chapel Hill: SILS
 University of North Texas
 University of South Florida
 University of Tennessee
 University of Virginia
 University of Wisconsin
 University of Wisconsin Press
 University Press of Florida
 Urban Libraries Council (ULC)

Valparaiso University
 Virginia Association of Museums (VAM)
 Virginia Tech Libraries
 Wayne State University
 Yale University

Staff

Katherine Skinner, Executive Director
 Melanie Schlosser, Scholarly Communications Program Leader
 Sam Meister, Digital Preservation Communities Manager
 Hannah Ballard, Project and Communications Manager (began 10/2017)
 Jessica Meyerson, Research Program Officer (began 8/2017)
 Courtney Vukasinovic, Administrative Coordinator
 Christina Drummond, Director of Strategic Initiatives (departed 7/2017)
 Donald Brown, Educopia Intern
 Ian Harmon, Library Publishing Coalition Intern

Board of Directors

Dr. Martin Halbert, President (Dean of University Libraries, University of North Carolina at Greensboro)
 Dr. David Seaman, Vice President (Dean of Libraries and University Librarian, Syracuse University)
 John Sherer, Treasurer (Spangler Family Director of the University of North Carolina Press)
 Cal Shepard, Secretary (State Librarian and the Director of the State Library of North Carolina)
 David Horth (Senior Fellow and Director of Innovation Venturing and Partnerships, Center for Creative Leadership)
 Dr. Tyler Walters (Dean, University Libraries, and Professor, Virginia Tech)

accomplishments:
what is the net result of grounded,
community-infused action? *Magnified impact!*

125 Libraries

shared details about their
library publishing program
outputs, staffing models,
and workflows

\$450,000+

in awards and subcontracts for grant-funded research

6 Staff Members

facilitating the energies and talents of hundreds of individuals, cultivating
and aligning their work towards shared goals and mutual benefit

2,788 Respondents

engaged in a national survey of
field-wide professional development
needs (for librarians, archivists,
and museum professionals)

133 Research Partners

involved with **6** Educopia-led
research projects

2 Incubating Communities

(and **1** community, the Coalition to
Advance Learning, successfully launched)

1,740 Digital Collections

preserved for **74** institutions through
the MetaArchive Cooperative network,
including **799** new collections in 2017

423 Attendees

at **7** workshops, **4** events, and **5** meet-ups

10 Digital Curation Workflows

of **10** institutions charted
and published

120

Member Institutions

in **3** Affiliated Communities
representing **7** countries and **4** continents

52

Publications

including the annual *Library Publishing Directory*, **4** articles and chapters, **1** report, **24** blog posts, **7** recordings, and **16** open education resources

3

Subcontracts

for Community
Cultivation work on
national-level initiatives

1

Cunha-Swartzburg Award

The MetaArchive Cooperative was awarded this international honor.

500+

library, archives, and museum professionals

trained (and counting!) through our
Nexus Leadership Development curriculum

2

Paid Interns

who build relationships with the pioneers
and leaders in the areas of digital
preservation and scholarly communications

20+ Trainers

and institutions deployed
the ETDplus curriculum
to audiences of more
than **1,200** attendees

19

Presentations

to a range of local, national, and
international audiences at major events

2017 projects list:

Mapping the Landscapes
(2015-17)

Nexus LAB (2014-17)

ETDplus (2015-17)

Developing a Curriculum
to Advance Library-Based
Publishing (2016-19)

OSSArcFlow (2017-19)

Software Preservation
Network (2015-17)

Fostering a Community of
Practice (2017-20)

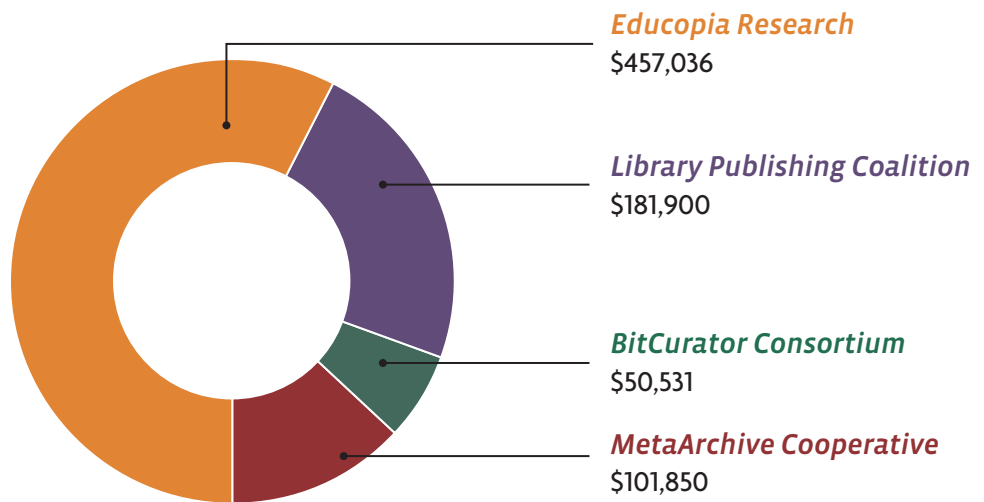
News on the Margins
(2017-18)

Preserving Electronic
Government Information
(2017-19)

FY2017 mmittment:

community investments yield more...
more shared expertise, *more* shared
 infrastructure, *more* shared success.

Income = \$791,317



2017 Educopia Institute Profit & Loss Statement (Unaudited)

Income

Membership	\$	290,244.05
Events and Programs	\$	49,430.57
Grants, Contracts, and Consulting	\$	450,371.71
Investment	\$	1,270.47

Total	\$	791,316.80
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Expense

Personnel	\$	413,424.88
Professional Services	\$	183,533.84
Office and General	\$	80,137.17
Events and Travel	\$	119,531.76

Total	\$	796,627.65
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Net	\$	(5,310.85)
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Connections: snapshots of our work

Cultivating Communities: In 2017, our three Affiliated Communities, two incubating communities, and nine community-led projects engaged hundreds of institutions and individuals in deep collaborations to accomplish what none of us could do alone. The resulting work bears influence not just at the institutional level, but also at the system level.



Saving Software Together

Aligning efforts to maximize impact

Software Preservation Network

<http://www.softwarepreservationnetwork.org/>

Standing at the intersection of industry and memory, the Software Preservation Network is aligning the efforts of gamers, artists, engineers, designers, curators, archivists, librarians, programmers, and publishers around common preservation needs.

The goal of this network is to bring attention to a problem shared by industry, academia, and libraries, archives, and museums: the persistence of the software we use to create and access most of the knowledge objects created today. The fusion of these diverse voices is not always easy—different drivers activate different pockets of stakeholders within the growing community. But this group is steadily identifying ways in which the interests of these distinct stakeholder communities can align towards shared goals.

The net result is that instead of these groups working in isolation with their limited resources, either building parallel infrastructure or competing infrastructures, they are working together to magnify the impact of investments made to support the sustainability of our digital records and artifacts.

Educopia Institute has worked in 2017 to cultivate and incubate the Software Preservation Network with a focus on capacity-building activities including establishing the mission, vision, values and strategic goals and completing several major working group deliverables. The community is ready for a full launch in 2018, with established services, a range of research and development activities, and a strong human network.

Photo by Alexandre Debiève on Unsplash



Scaling Preservation

Celebrating a decade of community-based digital preservation

MetaArchive Cooperative

<http://metaarchive.org>

For the MetaArchive Cooperative, 2017 was a year of celebration, reflection, and reinvention. The community rang in its ten-year anniversary as a membership organization and preservation network by receiving a national preservation excellence award.

A Decade of Success: MetaArchive was honored with the American Library Association's George Cunha and Susan Swartzburg Award, an annual prize recognizing individuals or groups that foster collaboration around preservation goals. It was especially significant to receive this award in the same year that we celebrated our first decade of successfully preserving digital assets in a community-driven distributed digital preservation network that spans 74 institutions on three continents. What started out as a grant-funded experiment has now become a trusted, reliable, and solid membership organization, preservation storage solution, and community of practitioners working together to take on digital preservation challenges.

Infrastructure Evolution: During the past year, MetaArchive committees have established a strong foundation for an evolution of the technical network infrastructure, conducting initial feasibility testing of a "SuperNode" network. One of the main drivers behind this infrastructure shift is a desire to make it more feasible for small organizations to join, participate, and start preserving their content in the MetaArchive network. Small organizations with limited resources have few options when it comes to affordable digital preservation solutions, and we hope that our efforts will provide a simple way for such organizations to protect their content against risk of loss. The shift to a SuperNode network will continue in 2018, as part of a set of goals outlined in MetaArchive's newly produced Strategic Directions document, and will align with our focus on membership growth and engagement over the next three years.



Aligning Leadership

Empowering leaders, catalyzing change

Nexus: Leading Across Boundaries (LAB)

<https://educopia.org/research/nexus>

By modeling boundary-spanning collaborations and connections, libraries, archives, and museums are empowered to address the system-level challenges and paradoxes of “knowledge dissemination” today.

In 2017, our Nexus: Leading Across Boundaries (LAB) effort officially launched a set of resources intended to strengthen the futures of libraries, archives, and museums and to enrich the communities they cultivate and serve. In doing so, we realized our goal to create a strong, extensible foundation to train and evaluate boundary-spanning leaders in archives, libraries, and museums.

Our publication of these outputs was made possible by the immense input of our partners, a set of leadership training hosts, trainers, and experts hailing from more than 32 associations across the library, archives, and museum fields. Together, our team conducted an environmental scan and documented the range of competencies leaders in these fields need today. We created cross-sector collaboration mechanisms, encouraging co-creation of tools and strategies. We also developed open, freely available curriculum resources and evaluation tools for use across these fields.

The quick uptake, adaptation, and use of these resources in dozens of leadership training programs and graduate school classes across the nation demonstrates the flexibility and utility of the outputs we released. These outputs include:

- **Layers of Leadership:** A detailed chart of high-demand leadership training skills and competencies, structured according to leadership roles (e.g., “Leading Self,” “Leading Others,” “Leading the Dept.,” etc.).
- **Core Curriculum:** Seven freely available leadership curriculum modules, all aimed at “Leading the Profession.” These are flexible and customizable and include slides, detailed facilitator notes, and activities.
- **Evaluation Framework:** This validated framework ties directly to the “Layers of Leadership” competencies and provides a common core for evaluating the impacts of leadership training.
- **Trainer’s Network:** Leadership development trainers and consultants are invited to join the project affiliated LinkedIn group to engage others working in this space.



Surfacing Voices

Surfacing the hidden voices of marginalized communities

News on the Margins

<https://educopia.org/research/margins>

The voices of marginalized communities, including those defined by such identity markers as skin color, ethnic origin, religious affiliation, sexuality, geography, and social class, are often invisible in mainstream news sources. Understanding the diverse experiences of people in the United States requires us to turn to sources written, produced, and disseminated by the broadest possible constellation of people.

In 2017, Educopia Institute and the Digital Public Library of America teamed up to work on a *News on the Margins* pilot project to explore and document the state of historical newspapers written by and for two marginalized groups in the U.S.: African American communities and LGBT communities. Our project has focused on designing and testing a foundation for identifying, gathering, synthesizing, and ultimately acting upon data that documents the current state of newspapers (digital, microfilm, and paper) written by and for African American and LGBT communities. Our goal was to surface the many African American and LGBT newspapers and periodicals that have been collected by libraries, archives, and museums, but that are all too often hidden from view and difficult to access. We sought to understand how to increase the visibility and accessibility of these resources, especially to the marginalized community audiences for whom they were initially written.

We have assembled a dataset of more than 56,000 African American and LGBT newspapers and periodicals held by more than 2,500 libraries, archives, museums, and government organizations. Our integration and analysis of this information, even in a pilot-level project, has uncovered information about the breadth, depth, and highly dispersed nature of these collections in the U.S.; it has also clarified how painfully few of these newspapers have been digitized or made available through open channels that make it feasible for African American and LGBT communities today to access these resources.



Stabilizing Bits

Engaging members, building community

BitCurator Consortium

<http://bitcuratorconsortium.org>

“Forensics” typically evokes images of CSI-style crime scene investigations. In libraries, archives, and museums, forensics addresses an equally gnarly task: stabilizing, validating, and sometimes recovering the 0’s and 1’s comprising endangered files. The similarity between the two might well be the sense of camaraderie and teamwork that both inspire.

The digital forensics community is burgeoning as more and more institutions realize that the mass of hardware and files they are acquiring need immediate attention. More than 90% of our public and private records—from the news to literary archives, and from scientific discoveries to architectural plans—originate as digital files today. Those files are vulnerable to media degradation (imagine the moment when the flash drive refuses to be read); they are also vulnerable to media obsolescence (imagine the moment when you have a perfect 5 ¼-inch floppy, but no hardware or software that can recognize or render what it contains).

Such challenges are best solved by engaged communities banding together across institutions of different types and sectors to establish standards, advance training, develop software and use cases, and to learn from each other’s experiences. The BitCurator Consortium modeled this sense of community engagement throughout 2017, including during its annual forum, which this year included hands-on training opportunities for beginners as well as time for deeper discussions and project development amongst more advanced digital forensics practitioners.



Building Curriculum

Elevating Training for Library Publishers

Library Publishing Curriculum

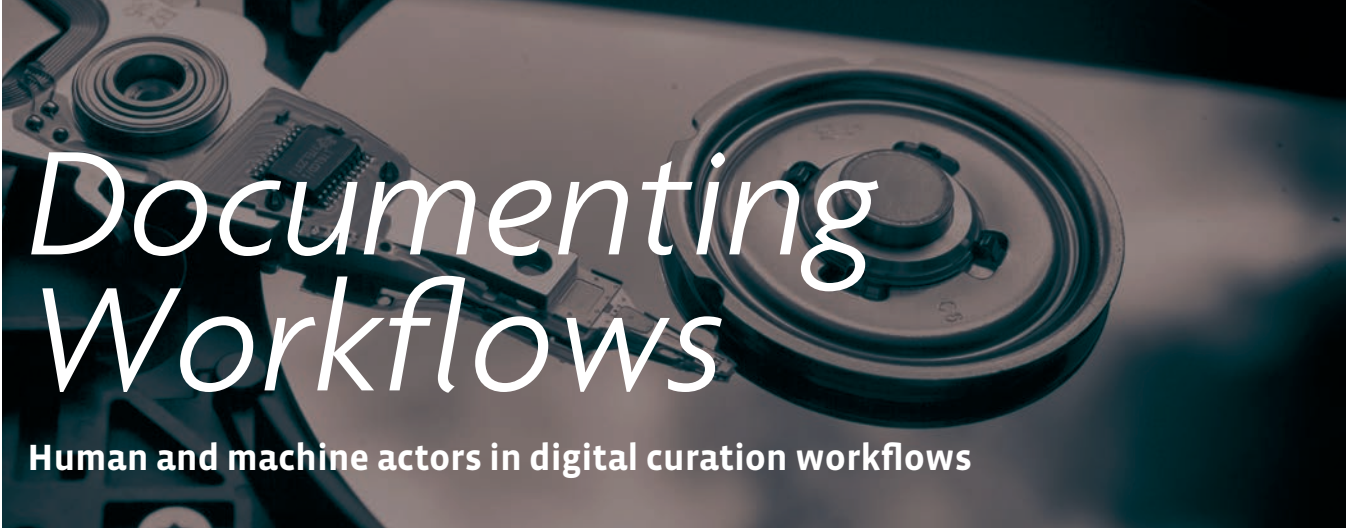
<https://educopia.org/deliverables/library-publishing-curriculum>

If you're a library publisher, or if you're starting a library publishing program, where do you turn for the expertise, resources, and skills that you need to create, sustain, and/or grow your publishing program?

Advised by twelve top experts in the field, the Developing a Curriculum to Advance Library Publishing (IMLS 2016-2018) project has brought together fourteen authors to produce four highly relevant modules totaling over sixty hours of teachable material. These modules cover a wide range of topics—from securing content to measuring impact to ensuring sustainability—with the purpose of preparing librarians and LIS students for meaningful jobs in scholarly communications and library publishing.

Crafting the Curriculum: In January 2017, the project team finalized module topics and issued a call for authors that resulted in a surge of interest in the project. After securing our authors, we brought them together with the Curriculum Design Consultant for an in-person retreat. The authors immersed themselves in the project's goals and objectives, coming to important conclusions on the scope, standards, and style of the curriculum pieces. In October, after months of research and writing, the author teams delivered their modules, complete with extensive lessons plans, helpful instructor guides, and supplementary activities. In the last two months of the year, the modules underwent an intensive peer review and community preview process before being passed on to an external expert for final edits and polishing.

Amplifying Impact: In 2018, we look forward to shining a bright light on this valuable resource through a series of in-person and virtual workshops, graduate course instruction, and other pilot events.



Documenting Workflows

Human and machine actors in digital curation workflows

OSSArcFlow

<https://educopia.org/research/ossarcflow>

No single workflow or system addresses all aspects of digital curation. So how can organizations advance their digital curation programs when faced with a plethora of tools, each requiring manual data transformation tasks?

The OSSArcFlow: Researching Archival Workflows for Born-Digital Content project (IMLS, 2017-19) is studying exactly this challenge in partnership with 12 organizations representing a range of sizes and types of libraries, archives, and historical societies. We are identifying a range of technical and institutional drivers that lead institutions to choose different workflow approaches, even when they are all using the same group of open source tools: BitCurator, Archivematica, and ArchivesSpace.

In order to cure inefficiencies at the system level, we must first understand and document how institutions are using digital curation tools. In 2017, our team produced four videos (available on YouTube) describing the project and the specific challenges that our 12 institutions today are facing as they deploy open source digital curation tools and workflows—many of which center on the metadata generated and stored with content in each system and the “hand-offs” between systems. Each partner also published a digital dossier in 2017 describing the form, function, and future of digital curation at their local institution.

OSSArcFlow partners:

Artefactual, Inc.

Atlanta University Center,
Robert W. Woodruff Library

District of Columbia Public Library

Duke University

Emory University

Kansas Historical Society

LYRASIS

Massachusetts Institute
of Technology (MIT)

Mount Holyoke College

New York Public Library

New York University

Rice University

Stanford University

University of North Carolina at
Chapel Hill, Odum Institute

University of North Carolina at
Chapel Hill, School of Information
and Library Science (UNC-SILS)

cohesion

collection

coordination

conservation

cooperation

construction

co-generation

collaboration

connection

coalition

conception

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INSTITUTE

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