



4<sup>th</sup> Annual DuraSpace Summit,  
March 2014

Michele Kimpton  
CEO, DuraSpace  
Jonathan Markow  
CSO, DuraSpace



# Members of the Board

- Paul Courant, Board Chair, U of Michigan
- Laura Woods, Vice Chair, Tufts U
- Tyler Walters, Treasurer, Virginia Tech
- Tom Cramer, Secretary, Stanford U
- Chuck Henry, E.D. CLIR
- James Hilton, U of Michigan
- Heather Joseph, E.D. SPARC
- Dan Cohen, E.D., DPLA
- Anne Jarvis, U of Cambridge
- Mike Conlon, U of Florida Clinical and Translational Science Institute



**2014 Sponsor Summit Meeting  
March 11-12**

**Agenda**

**Day 1: Tuesday, March 11**

*Location: Cosmos Club, Powell Room*

- |                       |   |
|-----------------------|---|
| <b>12:00-1:00 pm</b>  | Lunch and Welcome   |
| <b>12:00-12:30 pm</b> | Opening Remarks<br>Paul Courant, Chairman of the DuraSpace Board of Directors   |
| <b>12:30-1:10 pm</b>  | DuraSpace Strategic Overview "State of the Union"<br>Michele Kimpton, CEO, DuraSpace <ul style="list-style-type: none"><li>• DuraSpace's role in the community</li><li>• Key accomplishments for 2013</li><li>• Funding and sustainability</li><li>• Strategic priorities and goals for 2014</li></ul>  |
| <b>1:10-1:30 pm</b>   | Membership Model and Project Governance: Overview and Framework<br>Jonathan Markow, Chief Strategy Officer, DuraSpace   |
| <b>1:30-2:30pm</b>    | Open Source Project Overviews: Accomplishments, Goals and Strategies <ul style="list-style-type: none"><li>• Fedora: Rob Cartolano from Columbia University</li><li>• DSpace: Stuart Lewis from University of Edinburgh</li><li>• VIVO: Dean Krafft from Cornell University</li></ul>   |
| <b>2:30-2:45pm</b>    | <i>Break</i>  |
| <b>2:45-3:30 pm</b>   | Breakout session: What have you heard? What concerns you? What inspires you?<br>What do you have questions about?   |
| <b>3:30-5:00 pm</b>   | Research and Scholarship Ecosystem Evolution<br>Moderated by James Hilton, DuraSpace Board of Directors<br><br>Strategic projects for this community and project briefings<br>(10 minutes, plus 10 minutes for discussion and Q&A) <ul style="list-style-type: none"><li>• DPLA: Dan Cohen, Executive Director, DPLA</li><li>• SHARE: Elliott Shore, Executive Director, ARL</li><li>• Coherence at scale: Chuck Henry, President, CLIR</li><li>• DPN: James Hilton, University Librarian/Dean of Libraries, University of Michigan</li></ul> |
| <b>5:30-7:00 pm</b>   | Cocktail reception hosted by DuraSpace<br><i>Location: Cosmos Club, Crentz Room</i>   |



# ...Last year we needed to uncover the myths

- DuraSpace has teams of developers working on DSpace and Fedora
- DuraSpace is funded by the Moore foundation and others
- DuraSpace is DSpace on Fedora
- Our sponsorship dollars are funding Duracloud



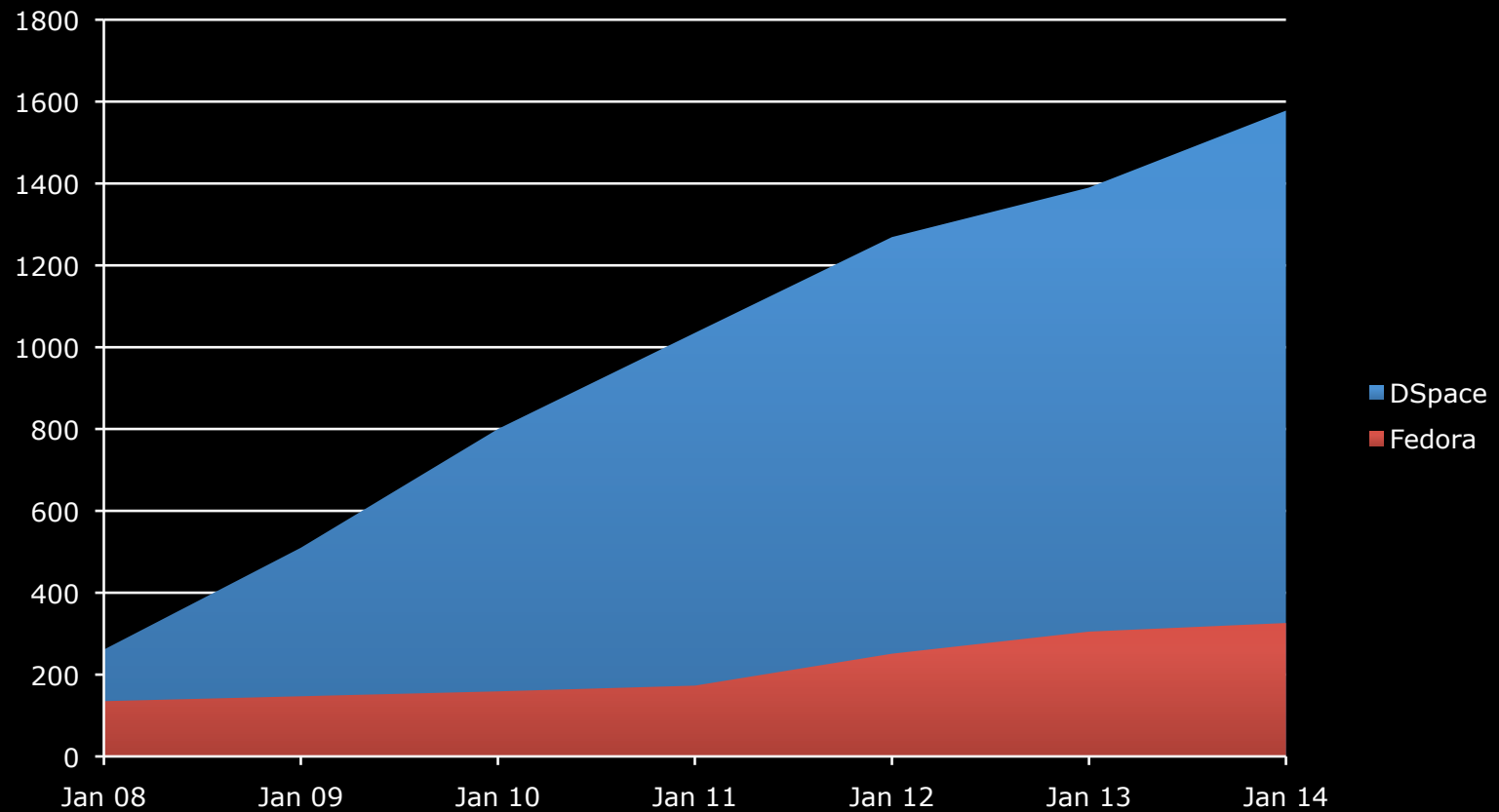
We needed to increase the level of **contribution** and **engagement** for both projects to ensure long term success

# Happy to report

- 70% increase in funding to DSpace/Fedora projects in 2013, \$708,870
- Community Governance is being established for all projects
- DuraSpace continues to make progress in building a sustainable model for the organization

# Community success stories

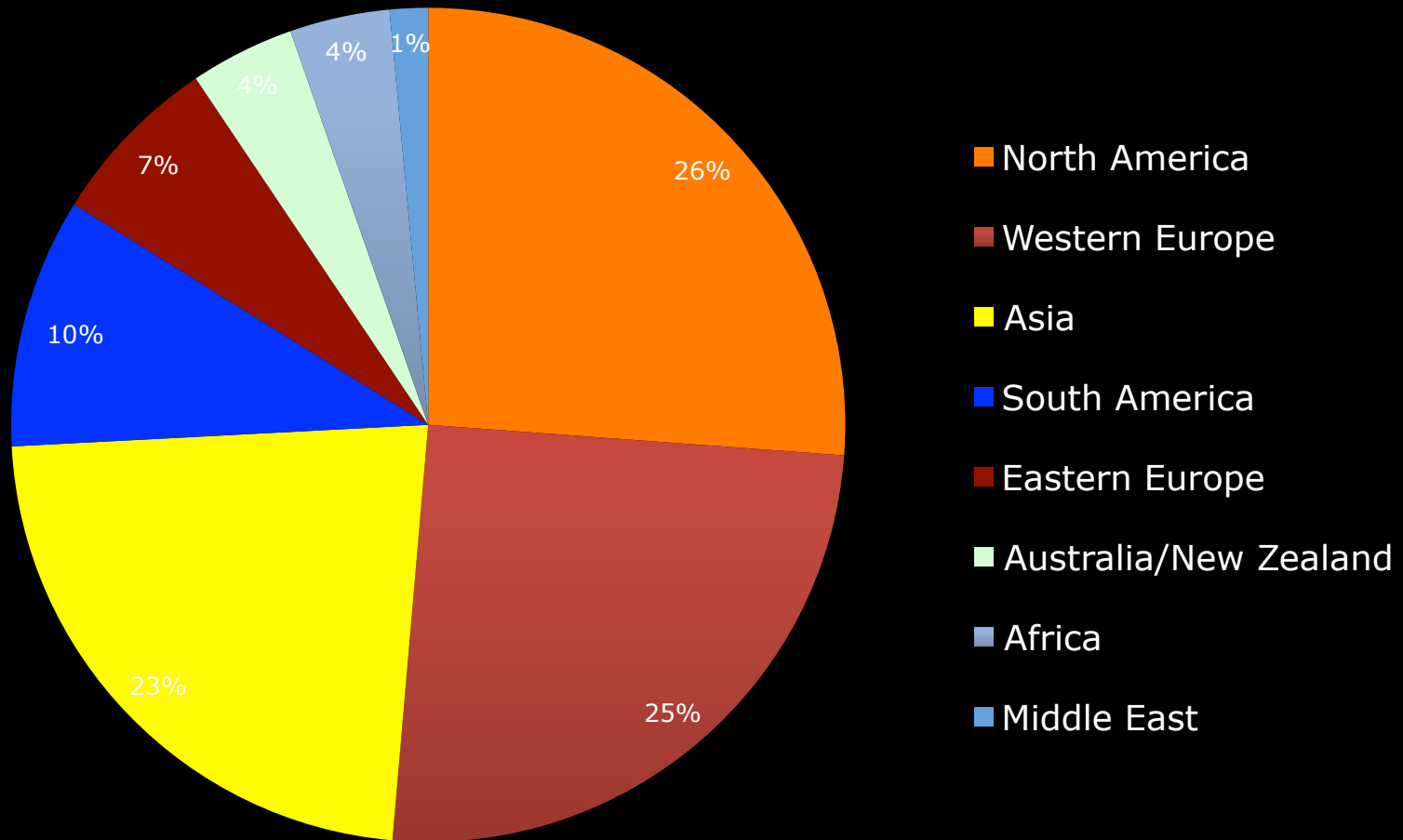
# Adoption of platforms over time



188 new DSpace and 21 new Fedora instances in 2013  
1,578 Total DSpace and 326 Total Fedora



# Our community is global

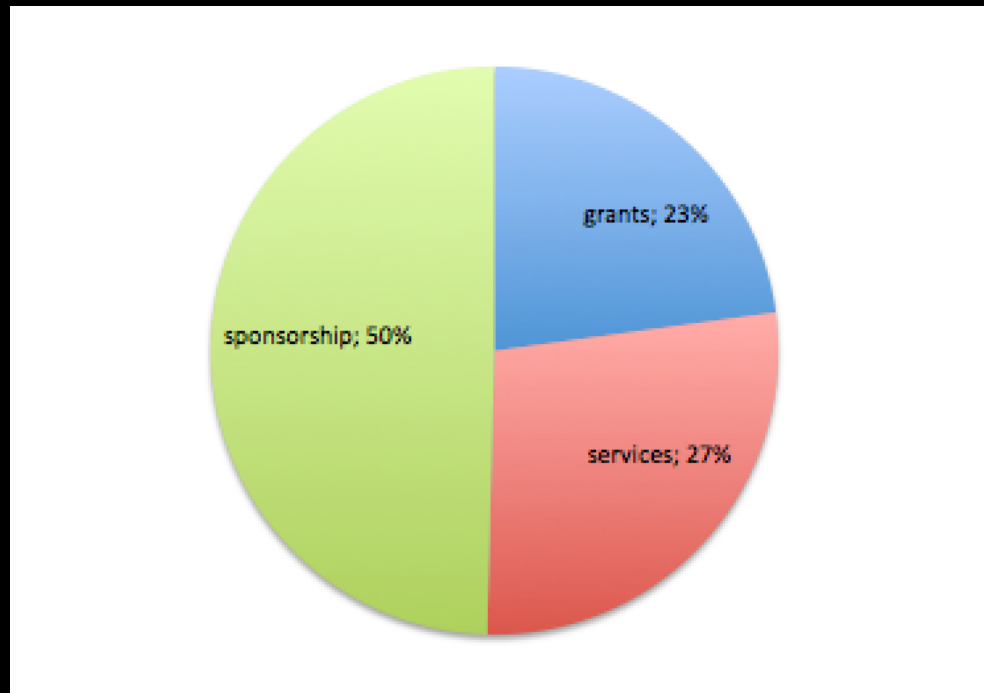


Continued adoption around the world, particularly developing Countries

# Funding and sustainability

# Diversified Funding Streams

## \$1.8 million 2013

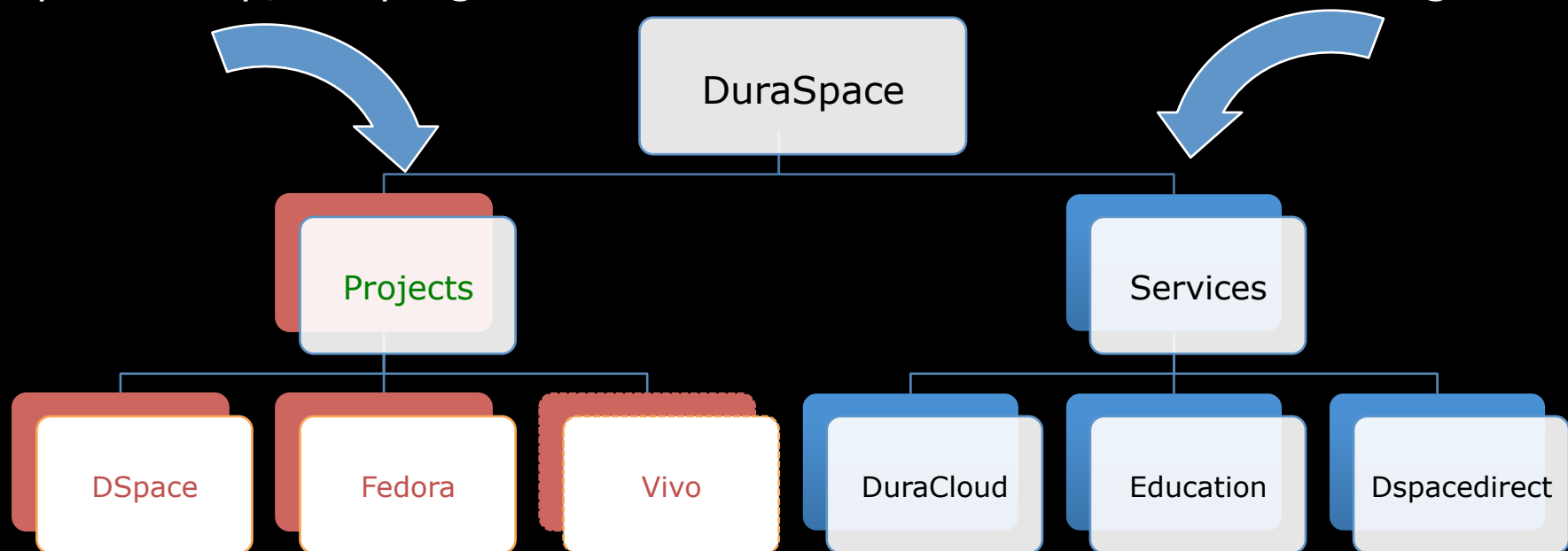


In 2009 organization was 100% grant funded, today only 23% comes from grants

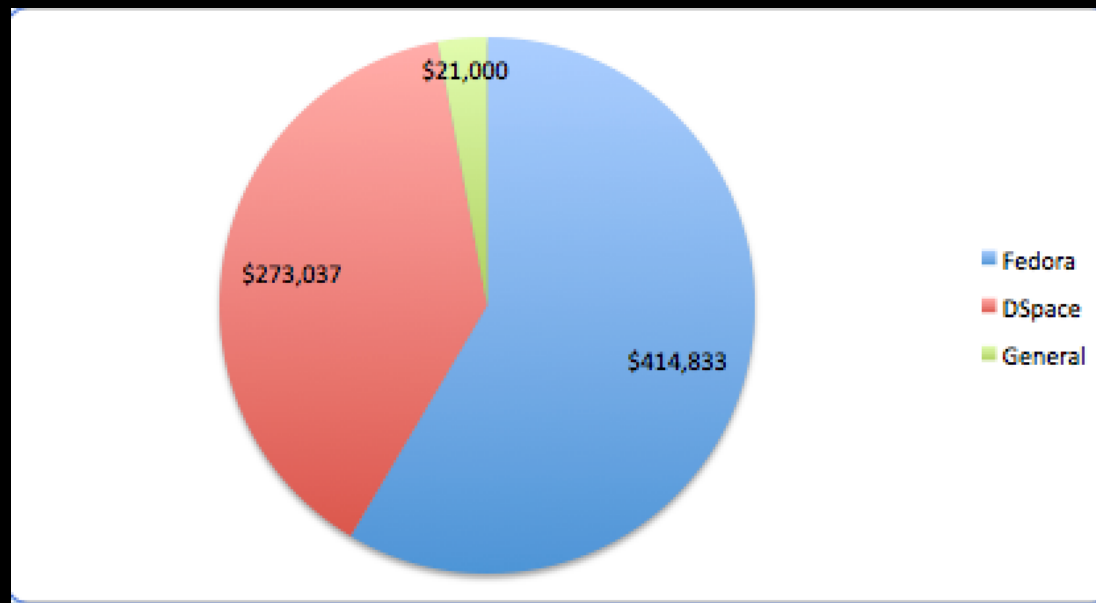
# How is funding allocated?

Funded through sponsorship, RSP program

Funded through service revenue and grants

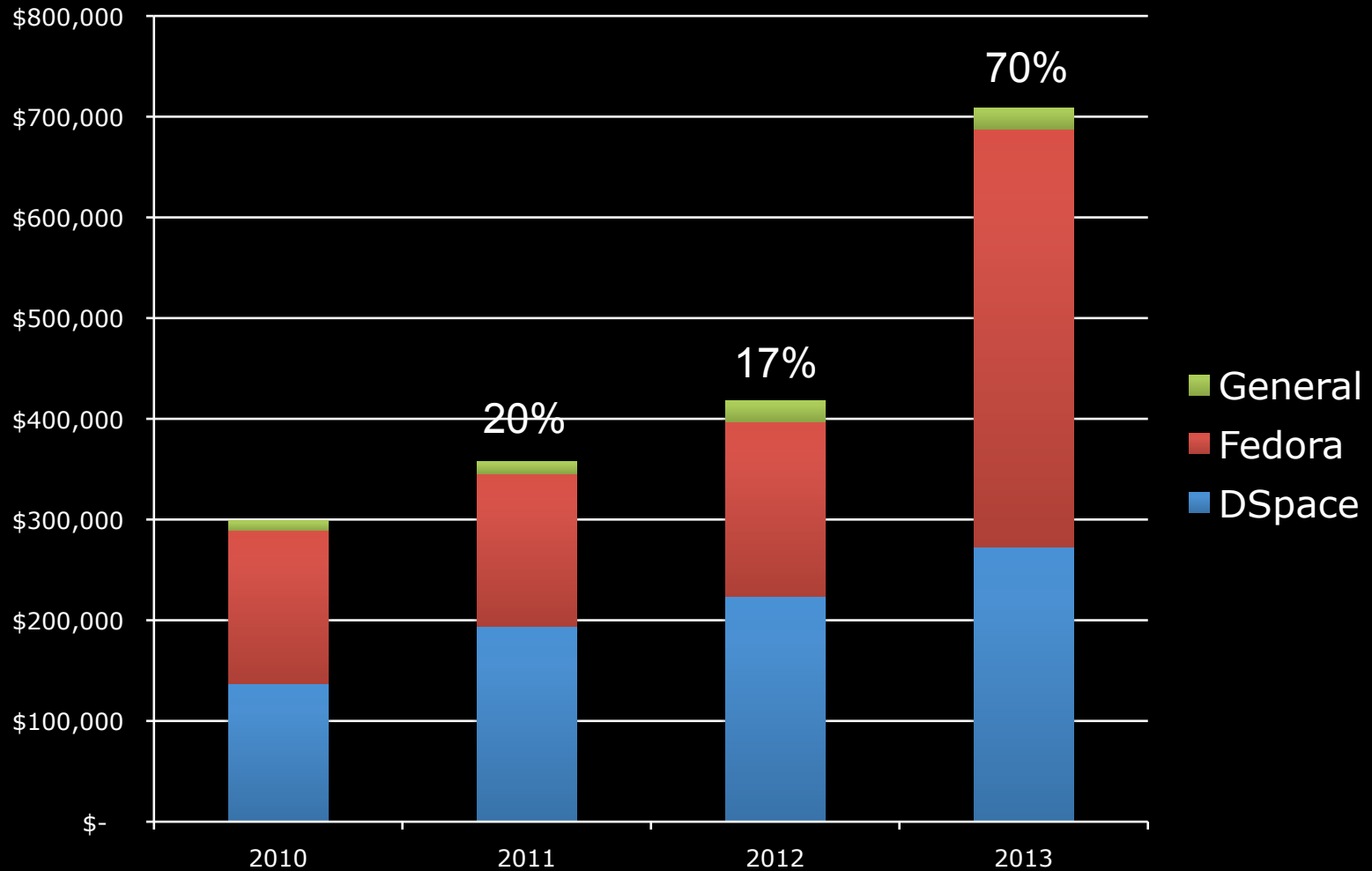


# Sponsorship 2013



\$708,870 for 2013  
70% growth over 2012  
Increased sponsors from 85 to 98

# Sponsorship Growth



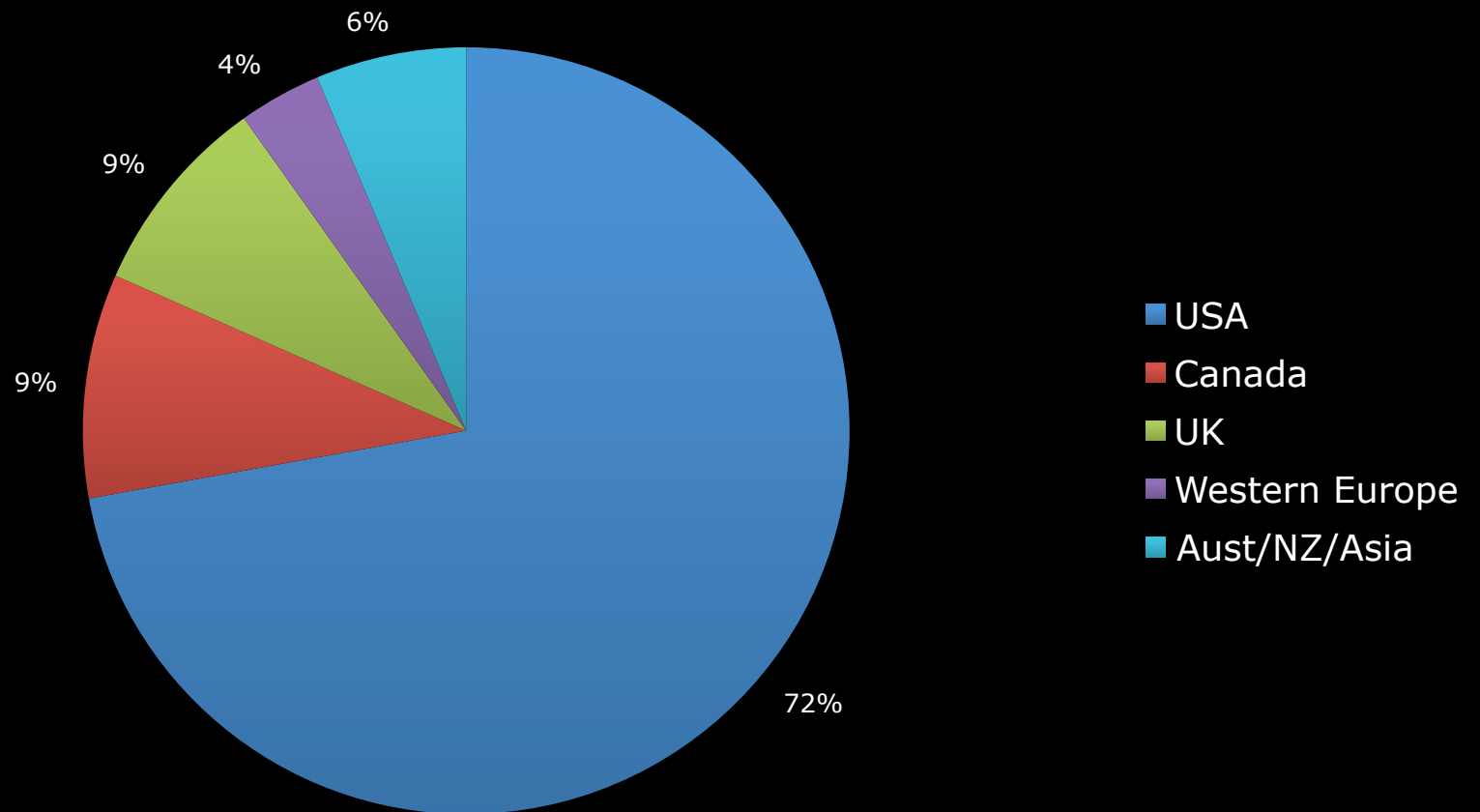
# Diamond Sponsors

- Columbia University
- University of Virginia
- Bodleian Libraries, Oxford
- Stanford University
- University of New South Wales
- Indiana University

\* *Diamond Sponsors , \$30,000 contribution plus .5 FTE developer*

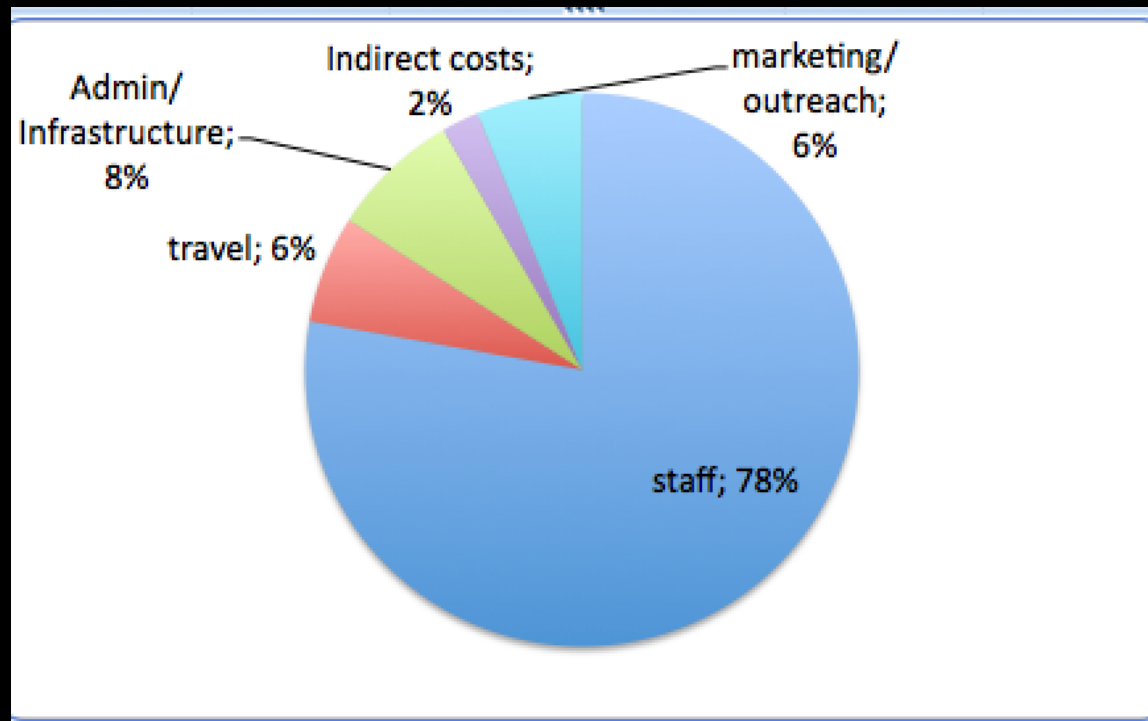


# 2013 Sponsorship by Geography (Fedora/DSpace)





# 2013 Project expenses (DSpace, Fedora)



# How DuraSpace supports it's projects

- Dedicated staff
- Fundraising
- Infrastructure( [wiki](#)/[website](#)/[jira](#))
- Marketing and outreach
- Administrative support
- Community programs

# Accomplishments 2013

# DuraSpace Projects

- 2013 achievements
  - Governance established for each project
  - Increased sponsorship dollars to fund the projects
  - Project launch of Fedora 4 and hiring a dedicated Tech Lead and Product Manager
  - Successful incubation of VIVO, hiring dedicated Project Director now
  - Release of DSpace 4.0

# DuraSpace Services 2013

- Continue to grow cloud services directly and through partnerships
- Achievements
  - Launch of DSpace direct
  - Integration of DuraCloud with Archive it service
  - Net plus partner, Internet 2
  - DuraCloud Integration with Chronopolis as part of DPN first node

# Priorities 2014

## SERVICES

- Successful launch of Dspacedirect
- Implementation of DPN first node
- Internet 2 partnership
- Continue to evaluate new services based on needs of our community/projects

# Priorities 2014

## PROJECTS

- Establish effective governance for all three projects
- Move VIVO out of incubation, hire dedicated Project Director
- Successful launch of Fedora 4.0
- Increased engagement for DSpace, establish long term goals
- Continue to evaluate other projects for incubation
- Move to Community membership model

Questions?



# Why Membership?

- Increase community support
  - For many institutions, “Sponsorship” is a no-no! (Implies charitable contribution)
  - More institutions are budgeted for memberships; fewer for sponsorships
- Membership is consistent with our move towards participatory governance

## Membership Levels

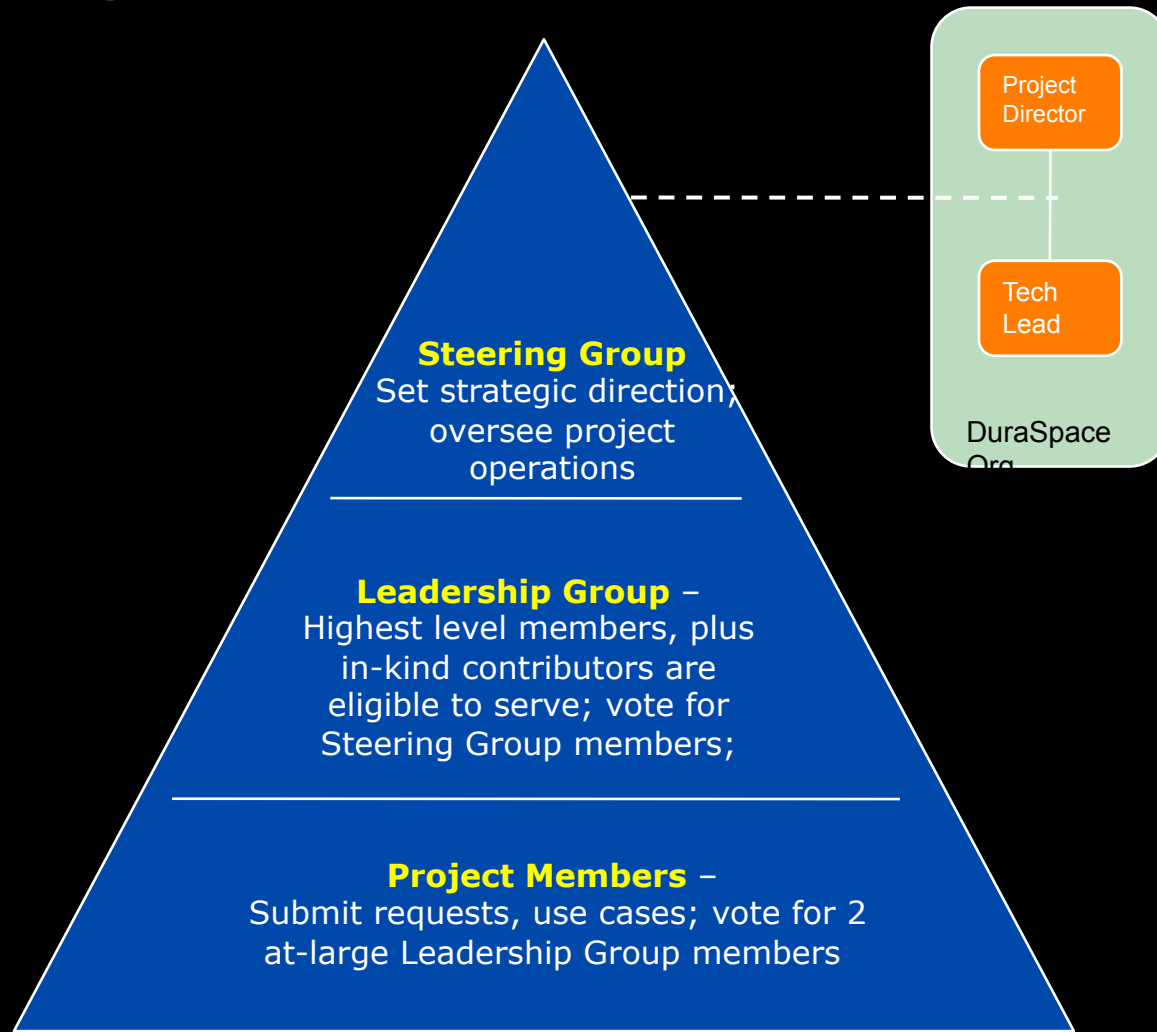
- Join at any level you want. Initial mapping is from same Sponsorship level:
  - Diamond: \$30,000
  - Platinum: \$20,000
  - Gold: \$10,000
  - Silver: \$ 5,000
  - Bronze: \$ 2,500
- Membership benefits to motivate joining at higher levels...

## Membership has its Privileges, e.g.:

- 10% discount to new members on first year of DSpaceDirect or DuraCloud
- Annual Sponsor Summit (varying #'s of seats)
- Special recognition for highest level contributors

*. . . Most importantly, eligible for participation in project governance*

# Project Governance model



# Membership Challenges

- Projects now have different number of Sponsorship levels
- Five levels – hard to deliver meaningful benefit differentiators
- Getting the community to understand
  - Not feel threatened by change
  - Value the benefits

# Questions