



Samvera Partner Contribution Model

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Background

For a number of years, Partners have struggled to understand what is expected of them and, conversely, the Community has struggled to understand what to offer Partners in return. One thing that has always been clear, though, Samvera has benefited from huge investments of in-kind resources from its Partners and adopters. However, the decision to move toward one or two permanent staff has resulted in a need for a reliable and more substantial funding stream.

The Samvera Partners commissioned a Contribution Model Working Group at the Partner Meeting in March 2018 in response to a recommendation by the Samvera Governance Working Group. Over the course of the next 20 months that group and a second, follow-on group, worked in consultation with Partners to develop a model that could be used by the Community to provide a sustained source of income. The model was formally adopted by Samvera's Partners in January 2020.

Financial Contribution Models

Samvera recognizes there are a diversity of organizations within the Community. As such, it has developed two models for providing contributions. The first applies to the class of Partners from academic, non-profit, or similarly situated institutions. The second applies to the class of Partners that are considered a Service Provider; that is, they provide services to others for a fee.

In addition, Samvera wants to value the in-kind contributions Partners bring to our Community, while also being cognizant that the Community needs a regular and sustainable source of income. To honor these contributions and to recognize that financial situations can fluctuate, a method has been devised for providing a discount to both classes of Partners should the Partner have a financial circumstance that necessitates the need to reduce their financial contribution to the Community.

Academic or Non-Profit Institutions

Not all academic, non-profit, or similarly situated institutions are in a position to contribute large sums of money. In broad terms, the model allows that each Partner is expected to contribute financially per fiscal year based on their size.

Contribution Model

The contribution model outlined in Figure 1 refers to academic institutions, non-profits, and similarly situated organizations.

	Institution Classification (Based on JSTOR)					Sustain
	Very Small	Small	Medium	Large	Very Large	
	JISC Bands					
	10, 9, 8	7, 6	5A, 5B	4, 3	2, 1	
25% Discount	N/A	\$750	\$3,750	\$5,625	\$7,500	N/A
Minimum Contribution	\$500	\$1,000	\$5,000	\$7,500	\$10,000	\$15,000

Figure 1. Contribution Model for Academic, Non-Profit, and Similar Institutions

Note the contribution is what is required as a Samvera Partner at minimum, partners are welcome to contribute higher dollar amounts if they so wish.

Discount process

A discount **may be applied** if an institution identifies a financial need for the discount, chooses to contribute in-kind to the Community, and records that contribution with the Community. In this eventuality the Partner is asked to contact the Samvera Steering Group (steering@samvera.org) to discuss the issue further.

Samvera Service Providers

Not all Samvera’s service providers are in a position to contribute large sums of money; many are small organizations that are tightly coupled to the Community.

Contribution Model

The model provides that Samvera service providers pay an annual fee each fiscal year to the Samvera Community; the annual fees are based on the number of hours billed by the service provider on Samvera-based projects or hours spent on maintaining services for customers (e.g. hosting services) during Samvera’s fiscal year¹.

Samvera Service Provider Classification						
	Very Small	Small	Medium	Large	Very Large	Sustain
	0 - 3000 Billed Hours	3001 - 7,500 Billed Hours	7,501 - 15,000 Billed Hours	15,001 - 22,500 Billed Hours	22,501+ Billed Hours	
25% Discount	N/A	\$750	\$3,750	\$5,625	\$7,500	N/A
Minimum Contribution	\$500	\$1,000	\$5,000	\$7,500	\$10,000	\$15,000

Figure 2. Contribution Model for Samvera Service Providers

Note the contribution is what is required as a Samvera Partner at minimum, partners are welcome to contribute higher dollar amounts if they so wish.

¹ Note that the number of billed hours is self-reported. It is expected that service providers are either tracking this information or can provide an estimation.

Discount Process

If a Partner of this class finds it difficult to make the minimum contribution, Partners annually have the opportunity to apply for a 25% discount based in part on the number of Partners the Samvera service provider billed as well as a valuation of the service provider's non-billable hours spent on in-kind contributions during Samvera's previous fiscal year. This discount model is similar to the ArchivesSpace Registered Service Provider model, in which service providers encourage their clients to become ArchivesSpace members.²

In the eventuality of financial difficulty, the Partner is asked to contact the Samvera Steering Group (steering@samvera.org) to discuss the issue further.

Implementation Plan

Samvera recognizes that financial situations vary from Partner to Partner. When the call for contributions goes out in spring 2022, all Partners will be expected to pay the minimum contribution amount or apply for the discounted contribution. In 2020 and 2021, Partners are asked to offer what they can in working towards being able to meet the 2022 contribution.

Benefits of Partnership

While seeking to provide a steady and largely predictable level of resourcing for the Community, Samvera recognizes that this is a two-way process. In return for Partner contributions, the Community should undertake to provide a number of benefits. These benefits have been outlined by Samvera Steering on the [Samvera Community Framework](#) wiki page under the [Benefits to All Samvera Partners](#) section. This list of benefits will be under periodic review.

² [Why and How to Become an RSP](#) from the ArchivesSpace Website.