Samvera Community Framework

From its inception as Hydra, Samvera has been designed to provide a generalizable, portable framework that would meet the needs not only of the three original institutions, but also those of a wider community. Originating as a multi-institutional project spanning three universities (Hull, Stanford and Virginia), and with support from Fedora Commons, Samvera has since expanded to include like-minded institutions with similar needs, technical infrastructures and complementary systems.

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Community Structure and Responsibilities

Adopters

Samvera is committed to being free and open source software. Adopters are members of the Samvera Community who use the software. The Community would not be what it is without adopters. Adoption, and all kinds of contributions big and small, can build toward Partnership.

Partnership

Samvera Partners are individuals, institutions, corporations or other groups that have formally committed to contributing to the Samvera Community. Samvera Partners collectively advance the project and the Community for the benefit of all participants.

The Samvera Partners contribute to groups that coordinate activity from multiple institutions and development efforts. These include the Steering Group, the Roadmap Council, the Core Components Maintenance Group and Samvera’s Interest and Working Groups, as well teams working on specific projects and solutions such as the Avalon Media System, Hyrax, and Hyku.

Partnership is earned by actively contributing to the Community. Partners:

- Contribute. In any one or more of: code, analysis, design, documentation, presentations and other forms of communication, marketing, support, funding, participation in working/interest groups, or other resources.
- Meet. Participate in Samvera Partner meetings and other conversations that shape our future.
- Vote. As a Partner, it is a duty and privilege to vote on elected positions and on other matters of importance.
- Lead. Help lead the way by participating in the governance of Samvera. Partners may provide input on the Community and technical direction up to the highest levels, and represent Samvera to the broader community.
- Stay Informed. Additionally, be among the first to be notified of any known security issues and fixes, ahead of the information being made public.

Benefits

By investing financially in Samvera’s future, Partners help ensure the longevity of the Community and its software. By contributing to Samvera’s Working and Interest Groups, and by having staff participate in the further development of our code and solutions, Partners protect their own investment in our products and services.

In return for Partner contributions, the Community undertakes to provide a number of specific services. These include:

- The right to vote in formal Samvera decision making (one vote per Partner institution)
- The right to put up candidates for election to the Samvera Steering Group
- The right to attend Partner meetings and Partner calls
- The right to advance information about any security vulnerabilities discovered in Samvera software (via the Partners’ closed mailing list)
- Centrally coordinated legal and financial services relating to
  - Rights management
  - Financial stewardship
  - Legal issues (including trademark)
- Marketing (including website and wiki)
- An annual Samvera Connect conference
- An annual Samvera Virtual Connect
- Access to the services of any Samvera appointed employees to help further local Samvera initiatives
- Public acknowledgement of Partnership in/on appropriate publicity materials (including the website and wiki)

In addition, there are less tangible, but potentially important, aspects to Samvera Partnership. For instance, many of our Partners have been successful in obtaining grants from philanthropic funds to assist and/or enhance the development of their local systems. An institution’s involvement in a larger community, and a commitment to feeding back developments for the wider benefit, can be seen to support the case for grant funding. The track record of Samvera Partners in successfully delivering the outputs of their respective grants and contributing those back to community solutions may be seen as a further benefit.
Responsibilities

All Samvera Partners are empowered with the responsibility to promote the well-being and development of the Community. Collectively, the Partners share responsibilities, including, but not limited to:

- Electing representatives to the Steering Group
- Community maintenance and growth
- Collaborative roadmapping (technical & community)
- Samvera application development
- Governance of, maintenance of and code contribution to the core components
- Design contribution: UI's, API's, data models, et al.
- Documentation and sharing of contributions, eg. through http://samvera.github.io/
- Community infrastructure provisioning & support (Bug trackers, Continuous Integration Servers, Web site, Wiki, etc.)
- Maintenance of the official Samvera website
- Resource coordination
- Recruitment
- Community advocacy (e.g., public speaking, writing articles)
- Participation and leadership in "Interest Groups" and "Working Groups" within the Samvera Community
- Meeting organization & planning
- Determining Community strategy

In January 2020, the Partners decided to adopt a financial Contribution Model to replace the system of voluntary donations that had previously been in place. The intention is that the increased revenue generated should be used both to fund the Community’s annually recurrent expenditure and to hire a full time Community Manager. Ultimately it is hoped that it will also be possible to hire a Technical Manager. The minimum level of contribution is determined by the size of the Partner organization.

How to become a Samvera Partner

The steps to become a Samvera Partner are:

1. Participation: Participate in the Samvera Community in one or more of the many ways described above.
2. Nomination. Be nominated by an existing Partner.
3. Invitation. Get invited to be a Partner by the Steering Group.
5. Approval. Be voted in by the Steering Group, and
6. Announcement. Be welcomed formally to the Community as a Partner.

Partners sign a formal one page Letter of Agreement (LoA) in support of the formal and legal Memorandum of Understanding (MoU) signed by the Steering Group in April 2012 (see below). Additionally, each Partner is asked at the time of joining the group to write a brief letter of intent indicating why they want to become a Samvera Partner and what they intend to contribute to the Community. (Note that we post these letters publicly in the wiki.) Partners are also required to have on file a corporate Contributor License Agreement (see Samvera Community Intellectual Property Licensing and Ownership page) to ensure that the Community can accept code and other intellectual contributions from the Partner institution. A composite document comprising the 2012 MoU, amendments made to it in 2018 to reflect the name change from Hydra to Samvera, changes made in 2019 to reflect governance changes in the Community, a version of the MoU showing the effect of these amendments, and a blank Letter of Agreement can be found here.

How to stop being a Samvera Partner

A Partner may leave by providing written notice to the Samvera Steering Group that they wish to withdraw from the Partner agreement.

Samvera Steering Group

The Samvera Steering Group is drawn from the Samvera Community. It consists of nine members elected from the Partner institutions. Each year, three members step down in rotation and elections are held to fill the three seats. Steering Group members are elected for three years and may serve no more than two contiguous terms. No two members may be supported concurrently by the same Partner institution. Steering Group members take on the same responsibilities as Partners and additional responsibilities including, but not limited to:

- Managing Samvera’s legal records
- Managing the licensing framework for Samvera code components
- Managing Samvera’s finances
- Appointing, and overseeing the work, of any Samvera staff positions approved by Partners
- Formally admitting new Samvera Partners
- Identifying individuals who have institutional authority to act on behalf of their Partner institution/entity
- Ensuring the quality of provision and support for the Community infrastructure
- Seeding / supporting the development of "Interest Groups" or "Working Groups" within the Samvera community
- Initiating working groups to review or update Samvera’s governance structure as required by the Steering Group bylaws
- Initiating working groups to review and/or update Samvera’s Code of Conduct and Anti-Harrassment Policy periodically
- Ensuring the quality of Samvera Partner and Connect meetings
- Ensuring appropriate management of the Samvera brand and official Community communications
- Ensuring the quality of the official Samvera website
- Formally representing the Samvera Community to funding agencies and (possible) commercial partners

Essentially, then, the Steering Group’s role is stewardship and central administration of the Community; they are responsible for helping create the structures to see that critical tasks are addressed, and backstopping the Partners’ group in case it doesn't fulfill these tasks. So, such things as:

- creating decision making structures
- decision making when decisions are not otherwise being made

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• backstopping partners when issues go unaddressed
• delicate issues handling
• stewardship and caretaking of the Community as a whole
• responsibility for providing continuity of the Community

How do you become a member of the Samvera Steering Group?

• If you are from a Partner institution and have their explicit support, you may put yourself forward, or agree that someone else put your name forward, as a candidate at a Steering Group election. Partners will vote to elect their preferred candidates.

The current membership of the Samvera Steering Group can be found Samvera Steering Group membership.

The current set of Bylaws governing the operation of the Steering Group can be found here.

**Samvera Code Development**

Anyone is welcome to use, improve, and hack on the Samvera codebase -- the code is open source!

How do you become a member of the Samvera developer community?

• Join the samvera-tech group and mailing list listed on our Get In Touch page
• Join the #dev channel on the Samvera slack organization - find instructions on the Get In Touch page
• Submit code to the Community (see guidelines), contribute resources to the group, and engage in the technical development process.

Samvera developers have a standing weekly call on Wednesdays 9:00am PDT / Noon EDT.

Some of the things Samvera developers do:

• Define technical architecture
• Coordinate development of common functionality
• Define and enforce development practices
• Code development
• Testing
• Integration and release
• Developer and deployment documentation
• Peer support for onboarding new developers

All Samvera code is distributed under an open source license (Apache 2.0 as of 2013), and Contributor License Agreements (CLA’s) based on the Apache Foundation CLA’s are required from contributors before their code can be added to the Community’s code base. See the Samvera Community Intellectual Property Licensing and Ownership page for more details.

Our code development is overseen and coordinated by a number of groups. The Roadmap Council exists to align the roadmaps of the various Samvera code initiatives where this makes sense. The council comprises the product owners of the core Samvera components and Solution Bundles and of representatives from relevant Interest or Working Groups. The essential elements of the Samvera code are maintained by the Core Components Maintenance Group which is devoted to the ongoing maintenance of identified core components via planned sprints organized in communication with the product owners. Hyrax, the repository toolkit that underpins other solution bundles has two key working groups: one for coordinating development, and another for its roadmap. Our solution bundles (Hyku and Avalon) each have their own development teams responsive to the needs of, and advised by, their users.