



samvera

2021 Annual Report



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From the Community

2021 was a year of change for Samvera as we all continued to struggle through the waves of the COVID-19 pandemic. The most exciting change was a move to a new fiscal sponsor, the OASIS Open Foundation-as-a-Service, allowing Samvera to operate as a 501(c)6 nonprofit. In early 2021, with our LYRASIS MOU set to expire in June 2021, Samvera set out to identify and evaluate fiscal home options. With input from Partners, the then Steering Group developed assessment criteria and evaluated options for fiscal sponsorship. The three organizations that were thoroughly vetted were: LYRASIS Community-Supported Programs, OASIS Foundation-as-a-Service, and Code for Science & Society project sponsorship.

While all three organizations have an excellent track record of services to projects, OASIS Open stood out by offering three important features: continued project independence; comprehensive fiscal and legal expertise; and a cost-effective fee. The Partners voted in April to move to OASIS under their Foundation-as-a-Service umbrella, and for the Samvera Steering Group to become the Samvera Board of Directors. Our Community Manager, Heather Greer Klein, transitioned to employment with OASIS Open in October 2021. This fiscal sponsor change has little impact on the day-to-day work of the Community, and it simplifies our fiscal and legal processes while ensuring our independence.

2021 also brought Samvera a new Partner. Our Partnership model is exactly what makes Samvera stand out in the open source repository world. PALCI (Partnership for Academic Library Collaboration & Innovation) and PALNI (Private Academic LibraryNetwork of Indiana) have joined us as their joint Hyku for Consortia project, which is developing an affordable, open-source, and collaborative institutional repository solution based on Samvera's Hyku software.

Three major community initiatives commenced in 2021. First, Samvera revamped its Code of Conduct and Anti-Harassment Policy. The Code of Conduct Working Group participated in incident response training and worked with an outside consultant, Annalee Flower Horne, to develop a comprehensive Incident Response Manual. The new Code of Conduct and Anti-Harassment Policy clearly defines community participation expectations, how to report conduct violations, and provide a thorough response process to those reports.

The second initiative launched in 2021 is the Samvera Technology Maintenance Hours Pledge drive for 2022 software maintenance work. Eight institutions pledged 3,066 hours of development and documentation maintenance to be completed in 2022, allowing community-driven working groups to prioritize and plan their work.

Lastly, Samvera announced a new award that honors the late Julie Allinson, a beloved Samvera Community member who was an incredible mentor, teacher, and friend. Beginning in 2022, the Samvera Community will present an award in Julie's name to a Community member who exemplifies her collaborative spirit. Anyone can donate to this award to provide future awardees with a plaque and US \$200.

We look forward to 2022 and continuing our unique focus on building a community which brings us together and sustains our software.



Samvera Partners

In 2021 we welcomed Hyku for Consortia as a new Samvera Partner. At the end of 2021 Samvera had 33 formal Partners:

Boston Public Library	Ubiquity Press
Columbia University	University of California, San Diego
Cornell University	University of California, Santa Barbara
CoSector, University of London	University of Cincinnati
Data Curation Experts	University of Houston Libraries
Duke University	University of Hull
Emory University	University of Michigan
Hyku for Consortia	University of Notre Dame
Indiana University	University of Oregon
Lafayette College	University of Utah
Northwestern University	University of Virginia
Notch8	University of York
Oregon State University	Washington University in St. Louis (WUSTL)
Penn State University	WGBH Media Library and Archives
Princeton University Library	Yale University
Stanford University	
The Digital Repository of Ireland	
Tufts University	

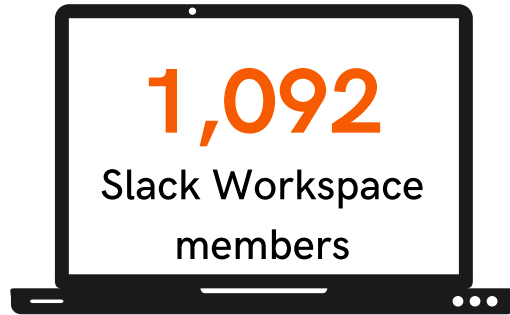
We are grateful for the many kinds of support that we get, not only from our formal Partners and their staff, but also from many other organizations in our Community.



2021 At A Glance

14

Active Working Groups
& Interest Groups



1,092

Slack Workspace
members

Most Active Components

hyrax
bulkrax
iiif-react-media-player
hyku
hydra-head
fcrepo-charts
valkyrie
avalon bundle
serverless-iiif
hyrax-doi

Developer Congress Efforts

- React IIIF Media Player
- Hyrax Valkyrization
- Dependency upgrades
- Onboarding new developers

Virtual Connect

Six hours over 2 days
150+ unique attendees
30 presenters

Connect 2021

200+ attendees
85+ organizations
9 countries
4 continents

GitHub Activity

35 contributors
14 institutions
80 active Github repositories
1,724 commits

Noteworthy releases from Hyku, Hyrax, Avalon and Valkyrie

- Avalon 7.2: supplemental file support, merging items, improved authorization flow for restricted content
- Hyrax 3.0: work towards incorporating Valkyrie functionality
- Hyku 3.0: theming and user management improvements, Bulkrax import/export
- Valkyrie 2.2: Fedora 6 support



Statement of Financial Position

December 31, 2021

Assets

Cash	_____	\$406,409
Accounts Receivables	_____	\$11,500
Prepaid Expenses	_____	\$(0)
Prepaid Host Admin Fees	_____	\$12,500
Total Assets	_____	\$430,409

Liabilities

Accounts Payable	_____	\$1,464
Liability: J Allinson Memorial Award	_____	\$460
Deferred Liabilities: Partner Dues	_____	\$97,313
Total Liabilities	_____	\$99,237
Surplus/(Deficit)	_____	\$331,172

Total Liabilities and Net Assets **\$430,409**



Combined Statements of Activities

December 31, 2021

Revenues

Samvera Partners

Partner Dues: Academic/Non Profits	_____	\$186,625
Partner Dues: Service Providers	_____	\$7,500
Total Partner Dues Revenues	_____	\$194,125
<i>Adjustment for Deferred Revenues</i>	_____	<i>\$(97,313)</i>
Total Recognized Income from Dues	_____	\$96,812

Other Revenues

Asset Transfer/Funds Deposit	_____	\$337,402
Total Recognized Income from Dues	_____	\$96,812
TOTAL INCOME	_____	\$434,215

Expenses

Salaries, Benefits and Taxes: Community Manager	_____	\$55,403
Website Hosting/ Google Workspace	_____	\$4,515
Marketing, Advertising, and Promotions	_____	\$800
Operation Expenses	_____	\$1,080
Consulting Expenses	_____	\$3,744
OODF FaaS Admin Fee	_____	\$37,500
TOTAL EXPENSES	_____	\$103,043

Note: Assets of \$337,402 were transferred from LYRASIS in July 2021 consisting of cash and prepaid accounts.