



Contribution Model WG Draft Recommendations

October 8th, 2018

Samvera Partner Meeting, University of Utah

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(WG Co-facilitators)*

samvera

History



The WG was formed at the behest of the Samvera Partner meeting held at Northwestern University in March 2018.

Membership, canvassed through the Partner list, representative of a range of Partner types:

Karen Cariani (WGBH, Boston - cultural heritage, sm to med broadcaster)	Ryan Steans (Northwestern U - education, medium university) Avalon, solution bundle)
Nora Egloff (Lafayette College - education, small college)	Stephanie Taylor (CoSector, U o London, large UK university, service provider)
Richard Green (U o Hull - education, medium UK university)	Annie Wu (U o Houston - education, medium university)

Scope



- Define what a Partner in good standing means
- Partnership cannot be defined by financial contribution levels.
- Develop a mechanism for identifying, valuing, and monitoring in-kind contributions
- Get information from partners
- Make recommendations about fundraising (though fundraising models were specifically excluded)
- Interim report by Connect 2018, final by no later than March 1, 2019.



Introduction: challenges

- Need for one or two permanent staff requires a stable funding stream: \$165-210k per person per annum in addition to Samvera's "usual" running expenses. This requires "cash in the bank" not "in-kind" contributions.
- Investigate a contribution model that might address this and be more explicit about what the Community expects from Partners and what Partners should expect from the Community.
- Model must be flexible to acknowledge that not all Partners have access to the same level of resources.
- What might "Supporters" (as opposed to Partners) expect in return for a purely monetary contribution?



Background research

The WG spent time researching the contribution models of a number of organizations. None of them was seen as an exact fit for the Samvera Community. Rather, the WG has drawn together elements from a number of them to inform its recommendations. Models examined included:

- Apache contribution model
- DuraSpace contribution model
- Apereo Foundation membership model
- Digital Public Library of America (a little different goal, but membership funded) <https://dp.la>
- Digital Preservation Network (<https://dpn.org>)
- The IIF Consortium

Partner survey: in-kind contributions



A Partner survey was developed to better understand the types of contribution currently being made by Partners and, to some extent, what benefit they felt accrued from these contributions.

Contribution types covered::

- Code-related
- Meetings and calls
- Admin-related
- Meeting related (organizational)
- Training related



Survey: the bottom lines

- Partners contributed in a wide range of ways and at a wide range of levels.
- Partners felt that, generally, they got a good return on investment for the resource they put in (the value of Partner calls was the least well supported item).
- Costed at a notional \$45 per hour, respondents were giving the equivalent of between \$2000 and \$85,000+ “in-kind”.



Monetary contributions: past

- In 2017, 21 organizations (two of them Supporters rather than Partners) contributed to Samvera's funds a total of \$77,000 - some of this in response to fundraising, the rest as donations. The contributions ranged from \$1,000 to \$5,000.
- At the time of writing (02/Oct/18), 2018's ongoing fund-raising effort had brought in \$91,000.
- Significant gulf between this and what it would take to employ staff.



Monetary contributions: future

Looking ahead:

- 45% (9) of the respondents indicated that they might be able to offer \$2,500-\$5,000 in the first year of a contribution agreement (with another possible), 15% suggested more, 40% suggested less.
- Asked about future years (specifically a third year), the pattern is broadly similar although 30% now think they may be able to offer more than \$5,000
- This falls a long way short of our aspirations.

Range of institutional type & budget



- Not all Partners are backed by the same level of resource. Some are numerically “people-rich”, some are “people-poor”; some are “cash-rich”, some are “cash poor”; some operate in a healthy national economy, some do not.
- This should be taken into account based on budget of the institutional unit that is the Partner (often the Library) and, if the situation arises, national economy.



Recommendations #1

In return for their contributions, Partners should expect:

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| <ul style="list-style-type: none">● 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<ul style="list-style-type: none">○ Rights management○ Financial stewardship○ Legal issues (including trademark)○ Marketing (including website and wiki) | <ul style="list-style-type: none">● 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) |
|--|---|



Recommendations #2

A number of possible models for staffing should be considered:

- Two FTEs funded entirely by Samvera (one community focused, on technically focused)
- One FTE funded entirely by Samvera covering both areas
- One or two FTEs taken on by an institution with some of their time paid for and devoted to Samvera
- An FTE employed by a Partner but with all their time gifted to Samvera
- An FTE seconded from a Partner for one or two years. Salary paid by Samvera but with a guaranteed post to return to after the agreed time.



Recommendation #3

Partner contributions should be “banded” with possible regional variation.

- A lower band applicable to non-profit organizations, service providers and, for instance, small liberal arts colleges with operational budgets for the Partner unit less than \$5,000,000.
- A middle band (into which most of our existing Partners would probably fit) of institutions with operating budgets for the Partner unit between \$5,000,000 and \$10,000,000.
- An upper band consisting of institutions with operating budgets for the Partner unit in excess of \$10,000,000.



Recommendation #4

Partners should commit to an annual contribution.

- As the basis for discussion, the WG suggest a figure of \$15,000pa (made up of “in-kind” and possible monetary contributions) for the mid-band. This is a baseline and we hope many will contribute more, as now. (However, remember that employing staff requires actual money, not in-kind. Ryan is developing some possible models.)
- The WG feel it is up to the Partners to set this or another figure they feel is appropriate, not the WG.
- A wholly monetary contribution is not a basis for Partnership.



Recommendation #5

Supporters are organizations which are not Partners but are, nevertheless, willing to support the Community by way of financial donation.

The Community should give some thought as to what we can offer Supporters in return for a purely monetary contribution .

Discuss!

