

## Pilot to Production: Next Generation Library Publishing

[Educopia](#), Open Weave Consulting, Inc., [Cast Iron Coding](#), [LPC](#), [CDL](#), [Stratos](#), and [Janeway](#) request \$249,998.99 over two years for a National Leadership Grant for Libraries implementation project to expand digital infrastructure options for library publishing programs that are values-aligned, open source, and community-led. This project aligns particularly well with NLG program goals 3.1, advancing digital inclusion via digital infrastructures and platforms, and 5.1, collaboratively supporting development and management of replicable systems for public knowledge. This work will seed a new ecosystem for open, public knowledge, while countering the conglomerate, profit-driven commercial models that currently dominate this sector.

The evolving policy landscape will lead to a wave of open access publishing in the coming years. Open access publishing requires an open infrastructure and mission-aligned service layer to thrive. This project will advance the [Next Generation Library Publishing \(NGLP\)](#) infrastructure and service models that our team has already developed and piloted (2019-2022), enhancing the functionality of our state-of-the-art display layer Meru and its connections with the open source manuscript management and repository platforms (Janeway and DSpace respectively) and developing the migration tools needed to empower library publishers to leave proprietary legacy systems. IMLS' investment in the project will be complemented by a \$100,000 investment in DSpace development by the California Digital Library to add and refine critical features for library publishers. The project's primary deliverables will include 1) a production-ready, open source display layer (Meru) that rivals best-in-class proprietary library publishing solutions; 2) the migration of a pilot library publisher into the NGLP ecosystem; and 3) a suite of replicable tools, resources, and workflows that will enable other library publishers to follow suit.

## Project Justification

Library publishers, recognized change agents<sup>1</sup> in scholarly communication, publish many thousands of journals, data sets, monographs, conference proceedings, theses and dissertations, and other outputs each year.<sup>2</sup> Many library publishers explicitly partner with scholarly and praxis-based fields that lack significant funding, represent underrepresented communities, and center equity and inclusion in their approach to knowledge production.

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<sup>1</sup> Illustrative examples of humanities-focused publications in California Digital Library's eScholarship that center the work and experiences of marginalized communities: (Example 1) [Alon: Journal for Filipino American and Diasporic Studies](#) (Bulosan Center for Filipino Studies, at the Department of Asian American Studies, UC Davis), "Through *Alon*, we aim to generate and showcase works that positively engage with and critically analyze key questions in the production of knowledges regarding Filipino Americans and Filipino diasporic subjects: how are Filipino bodies represented across multiple forms of media and in what ways do Filipino people cultivate and create identities and subjectivities to counter these representations? What are the experiences of Filipino migrants and what about these experiences shed light on the nature of global racial capitalism? How do they imagine and organize toward non-extractive, sustainable futures? How do Filipino people construct an alternative global archipelago of being and belonging?..."; (Example 2) [How to Read an Aztec "Comic": Indigenous Knowledge, Mothers' Bodies, and Tamales in the Pot](#) (UC Merced Center for the Humanities), "This visual text represents some of the content from the article, 'Women, Childbirth, and the Sticky Tamales: Nahuatl Rhetoric and Worldview in the Glyphic Codex Borgia', by Felicia Lopez. Through the use of comic book conventions, readers are guided through the decipherment of logographic writing from Central Mexico and, in the process, are shown how colonization has limited our contemporary understanding of ancient Indigenous people. By offering reinterpretations of glyphs that reveal the cultural knowledge of women, this guided reading of a codex image paints a picture of Aztecs and other Indigenous people as intelligent, complex, and inventors of their own unique writing systems."; (Example 3) [American Indian Culture and Research Journal - AICRJ](#) (UCLA American Indian Studies Center) - Currently published by Allen press; **flipping to open access in eScholarship in February 2023, explicitly to ensure reach to Native communities.** "In print since 1971, the *American Indian Culture and Research Journal* (AICRJ) is an internationally renowned multidisciplinary journal designed for scholars and the general public. The premier journal in Native American studies, it publishes book reviews, literature, and original scholarly papers on a wide range of issues in the fields of history, anthropology, geography, sociology, political science, health, literature, law, education, and the arts." *While these publications are not typical book-length works, they reflect the priorities of researchers in the humanities who seek to engage both their professional peers and members of their cultural communities. We are eager to expand the cohort of library publishers who are positioned within academic institutions to provide robust and compelling publishing opportunities to their scholars to advance exactly this kind of work.*

<sup>2</sup> See e.g., <https://librarypublishing.org/library-publishing-landscape-2022/> and <https://librarypublishing.org/lp-directory/>.

Currently, library publishers have few options for producing, managing, and delivering their unique and heterogeneous content portfolio. These options primarily fall into two categories: 1) turnkey, hosted solutions using proprietary software and offered by for-profit vendors; and 2) multiple self-hosted open source platforms rigged together into an end-to-end publishing system. Both of these options create significant challenges for library publishers, stifling their growth and sustainability, and limiting their opportunities to innovate. The dominant proprietary solution on the market, bepress' Digital Commons, is expensive, has not kept pace with evolving needs, and has lost the trust of the library publishing community as a result of its business practices. On the other hand, the available open source options (including Janeway, Open Journal Systems, DSpace, and others), while often highly trusted and admired, do not provide the holistic and end-to-end functionality that library publishers require, typically focusing on only one type of content or one step in the publishing process. Most library publishers lack the resources to self-host, customize, and maintain an open source publishing stack. In order to scale as a healthy alternative to commercial publishing, library publishing needs open infrastructure and affordable, mission-aligned hosted service offerings to counter today's conglomerate, for-profit lock-in environments.<sup>3</sup>

Since 2019, NGLP has been working on solutions that address these challenges and empower library publishers to grow and thrive, including Meru, a unified web-delivery layer that integrates with and enhances widely adopted open source publishing and repository software (OJS, DSpace, and Janeway). Meru emerged from research conducted with the library publishing community during the Fall of 2020. Library publishers identified the need for enhanced journal publishing solutions and platforms that would enable them to deliver their full content portfolio in a single display layer. They expressed a strong preference for modular solutions that connect and enhance—rather than replace—widely adopted publishing software. They urged us to provide them with better choices by decoupling components and building truly extensible systems, not “all-in-one” or “end-to-end” services that are more likely to result in vendor lock-in.

Based on these findings, the NGLP team considered five existing open source technologies as potential components of a modular publishing ecosystem: Humanities Commons, PubPub, DSpace, OJS, and Janeway. All five were cited by library publishers as prospective technologies of interest and/or in current use. All five also adhered to the core values and principles enumerated by our research participants through such traits as “openness” and their inclination towards “community-governed practices”. In consultation with the community, we ultimately selected DSpace (for institutional repository content) and OJS and Janeway (journal publishing) as the focus of our efforts.

A new component, Meru, was conceived as a display layer that allows library publishers to leverage the advanced workflow capabilities of these individual systems and unify their outputs into a modern, flexible discovery and display interface. Meru significantly improves on currently available solutions for publishing journal and IR content. It displays aggregated content in a schema-based architecture to support a wide array of content sources and types, flexible collection-building, and multiple layers of branding and imprints. By decoupling the input functions of existing OS platforms, NGLP's ecosystem supports optimized workflows for producing different content types (e.g., Janeway for journals and DSpace for IR content) and a unified discovery and display system. Flexible content management gives library publishers the ability to create distinct content hubs for different departments or communities, while supporting unified discovery.

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<sup>3</sup> <https://educopia.org/nglp-lib-pub-infrastructure/>

The NGLP project team formally vetted its architectural approach with an external auditor, Open Tech Strategies in 2022. This group reviewed the soundness of NGLP project’s architectural approach to building interoperable components (rather than a monolithic publishing platform) and reviewed the details of its development plans for Meru. The resulting [NGLP Platform Design and Architecture Review](#) concluded, “the design, data model, and components are well-suited to the platform’s requirements. We found nothing to give us pause; indeed, if OTS’s own tech team were designing a system to meet these same requirements, it would probably look quite similar to the system NGLP, Cottage Labs, and Cast Iron Coding have designed.”

After development of a minimum viable product of Meru, NGLP structured three formal project pilots to test three different uses to demonstrate the feasibility of supporting this work in a range of common contexts.

- **The Turnkey Solution:** Led by Janeway Systems, this pilot tested the deployment of Meru and Janeway as a hosted, software as a service alternative to proprietary, commercial institutional repository and journal publishing platforms.
- **The Consortial Publisher:** Led by California Digital Library, this pilot tested Meru, Janeway, and DSpace as replacements for the bespoke architecture developed to support eScholarship, a large multi-tenant digital publishing platform for the University of California System.
- **The Journal Portal:** Led by the University of North Carolina Press and its Longleaf Services division, this pilot tested Janeway and Meru as a dynamic solution for a multi-campus journal publishing solution with a robust editorial and production service layer.

Each pilot received support from the NGLP team to coordinate technology deployment and customization, content harvesting, and assessment. Over the course of the pilot period, seven pilot instances (and one test instance) of Meru were launched and populated with content harvested from upstream systems (including Janeway, DSpace, and OJS), primarily using OAI-PMH.

At the end of the pilot period, all of the participating institutions reported that they were very likely to advocate adopting NGLP’s publishing solution if all functional requirements are met and a software-as-a-service offering is made available. Four of the five institutions are in the middle of multi-year contracts with bepress and are interested in a migration between 2023 and 2024.

To compete with established, profit-driven hosted solutions, the NGLP service providers (Cast Iron Coding and Janeway) now need support to shift from pilot to production, providing an exemplar not-for-profit, end-to-end service. Meru requires additional development before it can achieve feature-parity with widely adopted systems such as bepress and become a competitive alternative. Likewise, enhancements to DSpace will make this widely adopted open source repository system a more appealing and effective choice for the library publishing community specifically. CDL’s contributions to DSpace, in the form of a \$100,000 investment in developing these features, will solidify a key component of NGLP’s modular, open source software stack, and make it ready for deployment by service providers. California Digital Library has contracted with 4Science to develop several features that will be contributed to the DSpace community as part of an upcoming DSpace 7 release. The functionality covered under this arrangement will provide widespread benefits to the DSpace community and enable CDL to adopt DSpace for use as the core repository infrastructure for eScholarship. Contracted development enhancements include: Refined support for primary vs. supplemental files; extending the author metadata model to capture creator type and affiliation, including ROR; and capturing revision

history and, when an item is withdrawn, maintaining a public record to preserve the academic record. The work is set to be completed by the end of August 2023.

The final step that moves pilots to production-level offerings is migration support: the one most often missed by academy-led, values-aligned projects. Without it, many promising infrastructure projects have withered on the vine instead of flourishing and serving a solid clientele. Additionally, most library publishers who are looking for new services have to time their departures from existing services carefully, due to both contract limitations and the pressure and energy required from staff in any migration or transition process. Onboarding is a longer process for library publishing accordingly, and we currently anticipate a runway of 18 months to two years is both feasible and practical for having clients fully engaged with new systems. Given that standard contract lengths with service providers (e.g., Elsevier) tend to be multiyear and challenging to break, our service provider partners will be well-positioned to migrate our pilot participants and additional early adopters as their contracts expire. To give potential adopters the confidence to advocate for and adopt Meru and the NGLP system, we need to concretely demonstrate the viability of both the technology and the business model and prove their competitive advantage over existing platforms.

This project will enable us to do just that, by instantiating, in a generalizable and repeatable manner, an instance of a production-ready, end-to-end library publishing system comprising Meru, Janeway, and DSpace. Our primary metric for success will be the value we are able to provide for the library publishing community. We will be guided by the question: are we providing library publishers with enhanced functionality, expanded options, and increased cost-effectiveness compared with their current solutions?

Working with an exemplar library publisher (hereafter, “Pilot Partner”) who is ready to migrate from a legacy system, the project team will stand up and configure the end-to-end system; migrate existing content; and configure the system for submission, peer review, production, harvesting, and publication of new content consistent with the Pilot Partner’s needs. The Pilot Partner will collaborate with the PIs and Service Providers (Cast Iron Coding and Janeway) to develop a transparent, mutually beneficial contractual arrangement for ongoing hosting, maintenance, and platform development. This exemplar will serve as a model for additional potential adopters, providing 1) proof that the NGLP system is equipped with the features to replace a legacy publishing platform; 2) a live demonstration of Meru’s front-end features; 3) a fair and transparent service model for comparison with existing contracts and terms of service; and 4) a workflow for migration of existing content into the new system.

## **Project Work Plan**

### **August 2023 - December 2023: Refine project plans and build project infrastructure**

The Co-Principal Investigators (Jessica Meyerson, Sarah Lippincott, Catherine Mitchell, and Kristen Ratan) will refine project plans in partnership with our Service Providers (Janeway and Cast Iron Coding), execute contracts with all project partners, and develop project communications platforms. The PIs will also onboard a Pilot Partner, who will have been recruited *before* the start of the grant period. The Pilot Partner will be a library-based publisher with a commitment to centering marginalized and underrepresented voices (evidenced by their portfolio of journal and institutional repository content) who will serve as beta tester, key stakeholder, and early adopter of Meru. The Pilot Partner will provide a generalizable test case demonstrating Meru’s readiness as a replacement for legacy publishing platforms. PIs, contractors, partners, and advisors will hold a virtual kick-off to review goals, project work plan and

the Project Performance Plan to ensure that all project participants are clear on the ways in which Design Justice Principles and the FOREST Framework directly shape tasks associated with recruitment, communications, representation in user experience and acceptance testing, and feature prioritization. Formal product development, including consultation and coaching in user experience tester recruitment and protocol development, service design planning and delivery, business modeling, marketing and sales, and business metrics, will be led and facilitated by the Project Director (Sarah Lippincott), with advising from Co-PIs Meyerson, Rattan, and Mitchell. Stipends will be provided to individuals that participate in user experience testing, informational interviews, focus groups, and public virtual events.

**Jan-Dec 2024: Enhance technology and migrate library publisher into the NGLP ecosystem**

[Cast Iron Coding](#), in collaboration with the Project Director, the Pilot Partner, and the NGLP User Group (an established pool of over 40 library publisher stakeholders who have provided ongoing feedback over the last three years) will refine product requirements that will allow Meru to achieve feature parity with commercial competitors. Meru development will be conducted through a series of one-month sprints, which will comprise 1) one week of feature prioritization, definition, and refinement in consultation with the User Group, Pilot Partner, Project Director, and CIC; 2) two weeks of software development; and 3) one week of evaluation. This methodology will allow the project team to continually collect user feedback, reprioritize development tasks, iterate upon or refine new features, and concretely measure our progress towards our goals.

Development will focus on a subset of features designed to facilitate early adoption of Meru as a display layer for journals harvested from Janeway. The proposed roadmap includes the following major activities, in addition to minor refinements to the user interface and backend in support of stakeholder needs. Each feature will be defined and tested by our Pilot Partner and User Group.

*Refine and extend schemas.* At Meru's core is its support for content schemas, which allow library publishers to define how specific types of content is displayed and organized. Meru currently supports schemas for paper series; journal titles, issues, and articles; dissertations, and academic units. These existing schemas need to be refined, and expanded in consultation with stakeholders to make sure they have the requisite properties, and that those properties are displayed thoughtfully on the frontend. New schemas will be added to support high-demand content types such as books and datasets.

*Support templating primitives in schemas.* Currently, Meru's schemas are relatively rigid. They are hard-coded into the system, with each schema tied to a specific set of display components. Additional development would empower non-technical users to define their own content types and control how they render in Meru.

*Add support for controlled vocabularies.* There are a number of places where Meru needs to support controlled vocabularies (subject, department, contributor roles, etc.), and schemas need to be able to reference the controlled vocabularies that have been established in an instance of Meru. This feature, which requires API, frontend, and admin development, would include a mechanism for fetching controlled vocabularies from established data sources and APIs, ensuring that content in Meru conforms to best practices for providing structured, human- and machine-readable metadata.

*Build UIs for managing harvesting.* Harvesting content is complex. It's a long running process, lots of things can fail along the way, and it generally needs to happen asynchronously in the background. Meru currently supports a robust, command line subsystem to manage harvesting. To empower non-technical users to manage harvesting (i.e., pulling content from DSpace and Janeway), this subsystem should be exposed in the user interface. Users will be able to configure new content sources, manage the timing of harvesting, see detailed results and troubleshoot issues, make decisions about how to reconcile

differences in the upstream system and Meru, and more.

Concurrent with technical development, the Project Director, CIC, and Janeway will work with our Pilot Partner to coordinate and execute a migration of their IR and journal portfolio to the NGLP ecosystem. This will include migrating legacy content directly into Meru and configuring instances of DSpace and Janeway to host newly created content going forward. Workflows will be thoroughly documented, providing future adopters with a detailed roadmap for their own migrations. Like development, migration will comprise a series of sprints that include 1) packaging and remediating content, 2) ingesting content into the new system, 3) quality assurance and remediation. We anticipate three migration sprints, with the intention that Meru's existing and new features can be rigorously tested against a full portfolio of diverse content.

CIC and Janeway, as cooperative service providers for the NGLP ecosystem, will work together to calibrate their individual business models towards a more consciously interdependent sustainability model. We are grounding this work in the [FOREST Framework](#) and will publish an extensible model based on our findings. We will also create a clear business case to help library publishers advocate to administrators to transition off of existing contracts (often multi-year) in order to officially sign on to the NGLP solutions and approach. This business case will emphasize cost recovery, functionality, and user experience; it will include a procurement guide grounded in values-based indicators.

Over this period, we will convene open quarterly virtual forums (based on current interest, 75-200 attendees each) to share progress and involve additional library publishers and service providers in thinking about values alignment assessment and about how costs can be shared more effectively to enable community-led solutions to reach scale. We will also use targeted virtual presentations to reach specific administrative stakeholders (e.g., VPs of Research, University Librarians, Directors of Technology Services).

### **Jan-July 2025: Package replicable tools, resources, and workflows and evaluate project against goals**

The Project Director will work with the Pilot Partner and Service Provider to package the tools and lessons-learned over the course of development, migration, and instantiation into a reusable roadmap. Specifically, we will document each stage of the process as a toolkit and checklist for library publishers, covering 1) best practices for preparing content for migration into Meru, Janeway, and DSpace; 2) guidance on metadata remediation and/or schema configuration to ensure that content displays and behaves as expected in the new system; 3) detailed estimates of the costs of migration, instantiation, and configuration of the technology stack; 4) model terms of service, statements of work, and/or contract language governing the service provider relationship; 5) a procurement guide; 6) a technology sandbox where potential adopters can test the functionality of Meru, Janeway, and DSpace; 7) a white paper describing the NGLP system, its advantages, and a case study of its usage for library publishing.

Concurrently, the Project Director will evaluate the project as described in the Performance Measurement Plan. This will include gathering feedback from the Pilot Partner, User Group, and broader library publisher community; conducting formal acceptance testing with the Pilot Partner and a subset of User Group members; tabulating progress metrics gathered during technology and migration sprints; and conducting a survey of the library publishing community to gather feedback and expressions of interest in adopting the platform.

## Diversity Plan

Library publishers serve academic disciplines that are frequently overlooked by the commercial sector because they aren't profitable: either the discipline is considered too specialized or too new to have a broad audience; the publication seeks to reach communities, beyond other scholars, who cannot afford subscriptions; the authors want to *create with* (not merely *speak to*) global colleagues or some combination of these. As such, library publishers work to advance *both* broad public access to knowledge *and* improved representation of marginalized voices within the scholarly record through the use of Diamond OA publishing models. This project will operate in direct alignment with library publishing values and vision for a more equitable publishing landscape (for authors and readers). Key project commitments include:

- Recruit and compensate user testing participants, advisors via informational interviews and focus groups, and virtual event speakers that reflect underrepresented identities in publishing
- Recruit a Pilot Partner who has an explicit commitment to equity-centered publishing practices as evidenced by their repository contents and publishing catalog
- Prioritize accessibility and user-centered design in all software development
- Utilize anti-oppressive facilitation practices in User Group and Project Team meetings to ensure marginalized and/or minoritized voices are centered
- Utilize the [FOREST Framework](#) (shared values in scholarly communication) and [Design Justice Principles](#) as the backbone of the Performance Measurement Plan
- Engage in a collaborative, bottom-up process that brings multiple stakeholders into the big tent of planning for the future of library publishing, and research communications more broadly
- The project team plans to recruit a diverse set of stakeholders from the library publishing community to take part in testing, participate in virtual forums, and respond to the survey. We aim to ensure that all points for gathering user feedback described in the work plan include members of the publishing community who currently view these services as out-of-reach or impractical - as we want to ensure that project publications such as the cost details, best practices, and the white paper describing the NGLP system speak to the planning and advocacy needs of different sized/resourced institutions
- The project team commits to making major deliverables, including the white paper and virtual forum recordings, accessible for people who use screen readers and other assistive technology

## Project Results

This project will provide an exemplar of a transparent, collaborative service provider model for open source software that serves the needs of the library publishing community.

The project's primary deliverables will include 1) a production-ready, open source display layer (Meru) that rivals the best-in-class proprietary library publishing solutions; 2) the migration of a pilot library publisher into the NGLP ecosystem; and 3) a suite of replicable tools, resources, and workflows that will enable other library publishers to follow suit. Software developed for the project will be released open source with an MIT license and all written resources will be released under a CC-BY license. We anticipate at least 10 uses of our migration toolkit in the two years following the project completion, and at least 400 individuals engaging with our broader suite of resources and events, as measured by page views and downloads, event attendance, participation in our User Group, and other interactions.

With IMLS support to build the NGLP system’s feature parity with commercial options, stand up an early adopter instance, develop a replicable roadmap for procurement and migration, and continue to engage an enthusiastic future user community, we will be able to move NGLP from pilot to production, creating avenues for thousands of scholarly journals, monographs, and other products to move from proprietary silos to open infrastructure. We will be able to produce the tools we need to give library publishers confidence in choosing the NGLP system and advancing a community of practice around open source technology for open access publishing. This work aims to increase the number of institutions engaged in publishing practices that center marginalized knowledge producers and lower readers’ barrier to access for a much broader range of research outputs. We expect this work to influence national and global conversations regarding how nonprofit publishing efforts can scale by channeling, connecting, streamlining, and standardizing interoperability and values alignment.



Educopia Institute, Inc. - Pilot to Production: Next Generation Library Publishing																									
		2023					2024												2025						
Activity	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	
Refine project plans, execute contracts, refine project plan	█	█	█	█	█																				
Enhance technology and migrate library publisher into the NGLP ecosystem						█	█	█	█	█	█	█	█	█	█	█	█								
Migration Sprints 1-3						█	█	█																	
Development Sprints 1-12 (includes iterative user testing)						█	█	█	█	█	█	█	█	█	█	█	█								
Package replicable tools, resources, and workflows, evaluate																		█	█	█	█	█	█	█	█
Partner Kick-off Meeting			█																						
Quarterly Reports								█					█				█							█	
Quarterly User Group Meetings								█					█				█						█		
Quarterly Virtual Forums								█					█				█						█		
Quarterly Project Partner Check-ins								█					█				█						█		

## **Digital Products Plan**

### **Type**

The digital products expected from this project include:

- A production-ready, open source display layer (Meru) that rivals the best-in-class proprietary library publishing solutions. Software developed for the project will be released open source with an MIT license and all written resources will be released under a CC-BY license via the NGLP GitHub repository (<https://github.com/NGLPteam>).
- A toolkit and checklist for library publishers, covering 1) best practices for preparing content for migration into Meru, Janeway, and DSpace; 2) guidance on metadata remediation and/or schema configuration to ensure that content displays and behaves as expected in the new system; 3) detailed estimates of the costs of migration, instantiation, and configuration of the technology stack; 4) model terms of service, statements of work, and/or contract language governing the service provider relationship; 5) a procurement guide; 6) a technology sandbox where potential adopters can test the functionality of Meru, Janeway, and DSpace
- A white paper describing the NGLP system, its advantages, and a case study of its usage for library publishing.
- A project pitch deck, which will be used to recruit additional early adopters of the NGLP system.
- Qualitative research instruments for acceptance testing of the NGLP components.
- Research data, which may include interview transcripts, focus group notes, and survey responses.
- Quarterly community forum video recordings and presentation, which will include a transcript and presentation slides.

The toolkit, white paper, project pitch deck, qualitative research instruments, closing webinar transcript, and closing webinar slides will be made available as digital download in PDF format. The closing webinar video recording will be made available as digital download in MPEG-4 video format.

### **Availability**

All public-facing outputs (white paper, research instruments, and closing webinar recording, transcript, and presentation slides) will be made available on Educopia's website ([educopia.org](http://educopia.org)) on a dedicated webpage for the project. The deliverables will be promoted widely through Educopia's newsletter and blog, various social media accounts, and relevant listservs.

The recording of the closing webinar will exist on Educopia's YouTube channel (<https://www.youtube.com/channel/UCclexiRJem2DBWg8ApmrBHA>).

No data that would allow individuals to be individually identified will be included in the public outputs without proper consent.

### **Access**

All public-facing text and audiovisual outputs will be licensed under a Creative Commons Attribution (CC-BY) license for the widest possible dissemination and attribution. We will assert no ownership rights beyond the basic attribution clause in the CC-BY license. Code will be licensed under an MIT license

### **Sustainability**

All public-facing outputs will be uploaded through an open-access repository (e.g., Zenodo) and assigned an individual DOI. Educopia will manage hosting and backup of this asset by utilizing WordPressEngine. Additional back-up files will be housed in a private, protected drive only accessible to Educopia staff and project partners.

## **Organizational Profile**

**Mission:** The [Educopia Institute](#) empowers collaborative communities to create, share, and preserve knowledge. Every activity we undertake is explicitly designed to encourage system-wide transformation as organizations work collectively to ensure knowledge is sustainably produced, widely shared, and preserved. Since 2006, Educopia has specialized in:

- Working with community leaders to harness state-of-the-field research while developing organizational frameworks, governance structures, and economic models that provide the foundation for community-driven growth and sustainability.
- Offering advising and consulting services to libraries, consortia, and associations; producing reports, publications, and policy documentation; and hosting symposia, seminars, and workshops.
- Catalyzing cross-institutional projects with academic and cultural institutions, applying for grants on their behalf, and administering and facilitating such grants when awarded.

### **Service Areas:**

**Communities:** Educopia is a fiscal host to collaborative communities dedicated to creating, sharing, and preserving knowledge. All of our hosted communities are mission-aligned, but range widely in terms of their focus, activities, services, and revenue models. Affiliated Communities include: BitCurator Consortium (members include research libraries, government archives, and other cultural heritage institutions), Library Publishing Coalition (members include research libraries and consortia), MetaArchive Cooperative (members include research libraries, consortia, and museums), and the Software Preservation Network (members include research libraries, archives, and museums).

**Research:** Through research, Educopia seeks to transform entire disciplines, going beyond individual institutions and communities to bring about systemic change through state-of-the-field studies and focused action plans. We seek to leverage the power of applied research to advance not just libraries, research centers, museums, or publishing groups, but the entire fields in which these institutions operate. Current research tracks for the Educopia Institute include: digital preservation, scholarly communication, and community cultivation. In these areas we manage research teams comprising research libraries and archives, association directors, and others, primarily from across the libraries and archives fields.

**Consulting:** Educopia provides consulting services for a wide variety of academic, research, and memory institutions on areas relevant to its networks and communities. We tailor our training, facilitation, and tools to every client by understanding the organization's current development through the lens of Educopia's [Community Cultivation Framework](#).

**History:** The Educopia Institute is a 501(c)(3) organization founded in 2006, to serve and advance the wellbeing of libraries by catalyzing the advancement of shared information systems and infrastructures. We are an intentionally small, virtual organization currently comprising 11 employees.