

Open Preservation Foundation

Strategic Plan 2015-18

Version 1.1 (June 2015)



Vision

Shared solutions for effective and efficient digital preservation.

Mission

The Open Preservation Foundation sustains knowledge and technology for the long-term management of digital cultural heritage. We provide our members with reliable solutions to the challenges of digital preservation.

Strategy

1. Knowledge

1.1 Ensure that our activities and services align with the needs of our members

| Strategy | Benefit | Open | Affiliate | Charter |
|---|--|------|-----------|---------|
| Collaborate with members to identify shared priorities | Steer strategy and set priorities Participate in annual planning, surveys | | ✓ | ✓ ✓ |
| Ensure accountability in delivering activities and reporting to members | Set and revise annual targets Access reports on member priorities | | ✓ | ✓ ✓ |
| Share our work regularly and transparently to inform members and the open digital preservation community about our activities | Receive updates on our activities | ✓ | ✓ | ✓ |

1.2 Facilitate the exchange of knowledge amongst peer institutions to further the development of best practices

| Strategy | Benefit | Open | Affiliate | Charter |
|---|---|-------------|-------------|-------------|
| Provide a central knowledge hub for the community to coordinate knowledge exchange (website) | Informed about organisation/activities Informed about Knowledge/Technology | ✓ ✓ | ✓ ✓ | ✓ ✓ |
| Enable community discussion of case studies, requirements, and user experience to support the emergence of effective approaches and best practices (blog, wiki) | Publish blog posts Comment on blog posts Contribute to the wiki | ✓ ✓ ✓ | ✓ ✓ ✓ | ✓ ✓ ✓ |

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|--|--|--------|---------------------------------|---------------------------------|
| Provide regular events, both virtual and face-to-face, to broadcast expert knowledge and enable collaboration on shared solutions (webinars, hackathons) | Select topics for events Set the agenda for events Attend events for free Priority booking for events Access archive of event recordings Attend events Access archive of event materials | ✓ ✓ | ✓ ✓ ✓ ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ ✓ ✓ ✓ |
| Organise information and activities around themed groups to support the discovery of experts and expertise (interest groups) | Select topics for interest groups Contribute requirements for research Read all materials related to a group Read summaries of materials | ✓ | ✓ ✓ | ✓ ✓ ✓ ✓ |
| Provide organisational support and infrastructure to community initiatives, not necessarily led by OPF but which benefit members | Select which initiatives to support Prioritise requirements for development Contribute requirements for development Contribute to the initiatives | ✓ | ✓ ✓ | ✓ ✓ ✓ ✓ |

1.3 Provide training and support for the development of staff skills and practice

| Strategy | Benefit | Open | Affiliate | Charter |
|--|---|------|-----------|-------------|
| Provide online training in digital preservation approaches and technology to support professional staff development | Select training topics Participate fully in training modules Access summaries of training modules | ✓ | ✓ ✓ | ✓ ✓ ✓ |
| Provide virtual demonstrations and practical support in the assessment and adoption of digital preservation approaches and tools | Select demonstrators and support Receive support in assessment/adoption Use online demonstrators | ✓ | ✓ ✓ | ✓ ✓ ✓ |
| Provide external review of member practice to support assurance or certification | Request review of tools or workflows Request review of development practices | | | ✓ ✓ |

2. Technology

2.1 Build confidence in currently available tools and approaches

| Strategy | Benefit | Open | Affiliate | Charter |
|--|---|--|---|--|
| Provide a sustainable home for leading digital preservation tools, regardless of their origin or current levels of support, providing the selection is driven by member need (consistency/consolidation) | <ul style="list-style-type: none"> Select tools for stewardship Request production of supporting material Access supporting material Receive support in implementing tools Implement sustainable software | <ul style="list-style-type: none"> ✓ | <ul style="list-style-type: none"> ✓ ✓ ✓ | <ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ |
| Carry out evaluation and quality assessments of digital preservation tools, and build open corpora to facilitate open testing and reporting (evaluation/testing) | <ul style="list-style-type: none"> Select tools for testing Provide user requirements Provide test corpora Access test reports on publication Access test reports after embargo Access test results (data only) | <ul style="list-style-type: none"> ✓ ✓ | <ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ | <ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ |
| Ensure consistency in releasing and packaging digital preservation tools, driven by the infrastructure and policy needs of our members (packaging) | <ul style="list-style-type: none"> Define environments for packaging Download packaged tools | <ul style="list-style-type: none"> ✓ | <ul style="list-style-type: none"> ✓ | <ul style="list-style-type: none"> ✓ ✓ |
| Coordinate requirements gathering, roadmapping, and community development of tools | <ul style="list-style-type: none"> Prioritise requirements Contribute requirements Contribute development effort | <ul style="list-style-type: none"> ✓ | <ul style="list-style-type: none"> ✓ ✓ | <ul style="list-style-type: none"> ✓ ✓ ✓ |

2.2 Support the emergence of effective digital preservation tools and their adoption in robust production workflows and systems

| Strategy | Benefit | Open | Affiliate | Charter |
|--|---|--------|-----------------------|----------------------------|
| Provide a clear process for the maturation or productisation of software projects from research through to development, release, and community maintenance | Define the process for stewardship Define target levels for maturity Select projects for review and support | | | ✓ ✓ ✓ |
| Gather requirements and organise acceptance testing amongst our members for emerging tools, in collaboration with their creators | Select tools for testing Provide user requirements Provide test corpora Access test reports Access test summaries Access test results data | ✓ ✓ | ✓ ✓ ✓ ✓ ✓ | ✓ ✓ ✓ ✓ ✓ ✓ |

2.3 Foster collaboration in consistent and efficient development practices

| Strategy | Benefit | Open | Affiliate | Charter |
|---|---|------|-----------|------------------|
| Provide leadership in the use of software development best practices and their application to digital preservation tools | Steer selection of platforms and practices Request support in development practices Request production of support materials Read software development principles | ✓ | ✓ | ✓ ✓ ✓ ✓ |
| Coordinate shared infrastructure to enable collaborative development, to support the maintenance of digital preservation software | Define infrastructure requirements Request support in use of infrastructure Make use of infrastructure | ✓ | ✓ ✓ | ✓ ✓ ✓ |

2.4 Host central community services

| Strategy | Benefit | Open | Affiliate | Charter |
|---|---|-------------------------------|-------------------------|---------------------------|
| Manage community services, for example those that require a single instance and collaborative contribution of content, where a business case identifies clear benefits to central hosting | Govern and manage the services Prioritise requirements for the services Contribute requirements for the services Contribute data to the services Use the services | (✓) (✓) (✓) | ✓ ✓ ✓ | ✓ ✓ ✓ ✓ ✓ |

* () indicates that some services might be member-only

3. Advocacy and Alliances

3.1 Advocate for open preservation

| Strategy | Benefit | Open | Affiliate | Charter |
|--|---|------|-----------|---------|
| Communicate the requirements and opportunities of open digital preservation approaches and solutions to policy makers, funders, and other strategic bodies | Request responses to consultations Request external communications | | | ✓ ✓ |

3.2 Collaborate with other communities and organisations

| Strategy | Benefit | Open | Affiliate | Charter |
|--|---|------|-----------|---------|
| Promote synergies in the development of digital practices and tools around the world | Prioritise domains for collaboration Request relationships with organisations | | | ✓ ✓ |
| Maximise efficiency in collaboration and reduce replication of effort | Contribute requirements for joint initiatives Steer alignments between organisations | | | ✓ ✓ |

3.3 Participate in projects which further the interests of our members

| Strategy | Benefit | Open | Affiliate | Charter |
|--|---|------|-----------|-------------|
| Join project consortia developing practices, software, or services which benefit our members | Steer the selection of projects Priority updates of project progress Participate in consultations and testing | | ✓ ✓ | ✓ ✓ ✓ |