



Meta Archive
cooperative

Strategic Directions
2018-2021

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Strategic Planning Process Background

The strategic planning effort was overseen by Sam Meister (MetaArchive Community Manager) and Katherine Skinner (Educopia Institute Executive Director), and facilitated by Christina Drummond (Educopia Director of Strategic Initiatives). The Community Manager and MetaArchive Steering Committee initiated this six-month planning process in December 2016, during the in-person committee meeting held in Washington, D.C. Throughout the current seven month process, Drummond engaged and collected feedback from the Steering Committee members via monthly WebEx conferences and team work activities. The Steering Committee and staff evaluated community strengths, weaknesses, opportunities, and threats and a survey of all members was conducted for additional feedback. A sub-group of Steering Committee members conducted an environmental scan for the MetaArchive Cooperative to inform services development, project selection, and operational strategy. This resulting document provides a three-year organizational development work plan for the MetaArchive Cooperative based on the findings from this planning process.

MetaArchive Cooperative in 2017

The MetaArchive Cooperative provides an affordable, community-based distributed digital preservation storage solution for its members. Utilizing the award-winning and proven LOCKSS software protocol, the MetaArchive technical network ensures geographic distribution and ongoing integrity monitoring of member's content. MetaArchive is owned, operated, and governed by member institutions who determine and implement the details of technical operations, membership levels and costs, and ongoing member engagement and outreach. All of these elements and services are driven by a cooperative approach facilitated by regular knowledge exchange and collaboration amongst members. Recognizing the ongoing challenges of implementing digital preservation activities, especially at small under-resourced institutions, MetaArchive has established new membership levels to lower the costs and technical barriers to make it more feasible for these kind of institutions to join and participate in the community.

As an initial stage of the strategic planning process, a survey was distributed to members asking for their thoughts and views on the value of MetaArchive, along with its challenges and opportunities. Members highly value the community-based nature of the collaborative governance and decision-making process, as well as the affordability of

membership. Additionally, members value the fundamental aspect of having multiple copies of their content distributed geographically. Members note the trending shift towards utilization of central campus IT services in academic libraries, as well as the cost of implementing server infrastructure as being significant challenges for the technical infrastructure. In terms of organizational challenges, the lack of clarity of differences between MetaArchive and other digital preservation solutions is seen as a major issue, along with limited member engagement and lack of full time technical support. Finally, members view integration with other platforms and systems, as well as simplification of the ingest process utilizing BagIt as opportunities to prioritize for the future.

Technological Goals

Goal 1: Improve and advance MetaArchive's technical infrastructure

Objective 1.1: Implement SuperNode network infrastructure to better support needs of smaller organizations.

Action 1.1.1: *Simplify ingests by using BagIt as primary ingest pathway.*

Action 1.1.2: *Implement support for drag-and-drop ingests via Owncloud.*

Action 1.1.3: *Seek new funding opportunities for SuperNode research and development (NSF, private foundations).*

Action 1.1.4: *Conduct SuperNode network pilot project.*

Action 1.1.5: *Implement production version of SuperNode network.*

Objective 1.2: Improve and increase transparency of technical documentation.

Action 1.2.1: *Review existing technical documentation to improve and identify sections to be made publicly available.*

Action 1.2.2: *Make selected sections of technical documentation publicly available.*

Action 1.2.3: *Develop and implement a documentation review cycle.*

Financial and Sustainability Goals

Goal 2: Grow membership numbers and types

Objective 2.1: Grow and diversify membership to include members from different organization types, augmenting the cooperative's flexibility, strengths, and skills.

Action 2.1.1: Develop specific benchmarks for growth, including number of institutions and diversity of organization types.

Action 2.1.2: Explore creation of new membership types

Action 2.1.3: Explore new types of membership payment plans

Action 2.1.4: Expand International Scope & Presence

Action 2.1.5: Develop marketing strategy

Community Goals

Goal 3. Increase member engagement and participation

Objective 3.1: Empower members of the cooperative to act on behalf of the community in all areas (outreach, membership, policy-setting, committee-work, infrastructure).

Action 3.1.1: Increase member participation on committees and working groups, through more effective ongoing project planning, communication, roles, and reporting.

Action 3.1.2: Evaluate committees for potential to strategically leverage activities in other organizations (e.g. NDSA).

Action 3.1.3: Develop financial model that accounts for in-kind contributions from members.

Action 3.1.4: Provide more channels and opportunities for ongoing regular member communication on preservation issues and activities.

Objective 3.2. Improve member retention and development.

Action 3.2.1: Establish new Membership Committee responsible specifically for internal outreach.

Action 3.2.2: *Develop distribute, and analyze results of survey for current members to identify needs, concerns, and member satisfaction.*

Action 3.2.3: *Develop formal committee charge to address survey findings.*

Action 3.2.4: *Create a new member orientation web page and assign committee responsibilities for orienting new members.*

Action 3.2.5: *Revise Outreach Committee charge with external marketing focus.*

Goal 4: Increase MetaArchive's reach and relationships

Objective 4.1: Grow knowledge about MetaArchive in new arenas.

Action 4.1.1: *Develop training resources (e.g. webinars) for, and knowledge sharing opportunities with, professional associations.*

Action 4.1.2: *Explore crowdfunding to support research and development projects.*

Action 4.1.3: *Develop informational videos on distributed digital preservation and distribute via YouTube.*

Objective 4.2. Develop a Strategic Affiliate/Alliance program.

Action 4.2.1: *Develop list of, and invite potential, strategic affiliate organizations.*