

ArchivesSpace Response to ATART questions

General Questions

What is open-source software?

According to the Open Source Definition advanced by the Open Source Initiative (<http://opensource.org/osd>), the term “Open Source” designates software in compiled form and source code licensed to be freely available and re-distributable in its original version or in derivative versions. While the Open Source Software (OSS) movement indicates a method of distribution and often methods for contribution and attribution, it does not suggest particular business models for sustaining an OSS project. Unsurprisingly, many OSS projects have implemented different strategies for sustaining themselves. These strategies include dual licensing, membership/user fees, consulting contracts, and fees for services and derivative products, such as documentation, user manuals, and training. Some of these strategies are apparent in MySQL, JasperSoft, Hibernate, and several other OSS products utilized by Archon, Archivists’ Toolkit, and ArchivesSpace.

What is community-developed software?

Community-developed software refers to a development philosophy associated with many open-source software projects. The hallmark characteristic of this development philosophy is that all members of an OSS project’s community are embraced as potential contributors to the development, testing, and maintenance of the software. Community-developed software empowers users, under the assumption that increased user participation in the development and maintenance of software will make the software more responsive to user needs, reduce bugs in the software, and increase overall quality and security of the software. Other characteristics of community-developed software include early and frequent releases of the software, a modular framework to support parallel development efforts, and an appropriate decision-making process that strongly involves the user community (either at the individual level or by representation)—all of which are predicated on the presence of a committed user community.

Why is ArchivesSpace charging for membership? Won’t ArchivesSpace be open-source software?

ArchivesSpace is open-source software that will require ongoing maintenance and development into the future. To underpin the sustainability of the ArchivesSpace application and community, an essential aspect of ArchivesSpace required by the funders and by any good practice, the ArchivesSpace project partners were required to find a feasible financial support model. Based on a report commissioned from Ithaka (now Ithaka S+R) and surveys of the archival community by Lisa Spiro and the ArchivesSpace planning grant team, the ArchivesSpace project team developed a membership model that provides funding for and governance of the software. The organizational home model was identified as a mechanism to provide staffing and fiscal accountability for the ongoing ArchivesSpace program.

Briefly, the membership model as designed is based on individual institution membership for both funding and governance participation. The individual institution model encourages organizations using the application to join the ArchivesSpace community and participate in the ongoing collaborative development and support of the application that is necessary for the application’s persistence and thus critical to the using community. Participation occurs in the form of governance groups, member-based discussion lists, collaborative code contribution, meetings at relevant conferences, etc. As added benefits, members will have access to dedicated staff, Help Desk services, a comprehensive and detailed user manual, and video tutorials for the application. The individual organizational membership fees – based on a tiered JSTOR model for academics and an adapted ARTstor model for non-academic organizations – are

designed to provide sole financial support for the staffing and organizational infrastructure required to sustain the operational activities of the ArchivesSpace program.

What happens with the money that comes in from membership fees?

The money received from ArchivesSpace membership fees supports the ArchivesSpace endeavor, which includes staff and operational expenses associated with sustaining the ArchivesSpace application, governance work, related travel, and other costs. The ArchivesSpace annual operating budget is approximately \$350,000. This funding supports the 2.75 full-time equivalent (FTE) staff (a dedicated Program Manager and Developer, as well as various supporting functions); project operational expenses, such as testing and development servers; travel expenses for staff members to be present at a variety of conferences (national, regional, and local), as well as board meetings; hardware and software expenses; the development of training; refinement of migration tools; and day-to-day operational expenses. While foundation funding supported the development of ArchivesSpace, actual ongoing operations and support must be self-funded.

Governance

What are the specific duties and role for the Board of Trustees/Governance Board/Initial Board (multiple names have been used to describe this body)?

The ArchivesSpace Board of Trustees represents the ArchivesSpace community, with membership of the Board comprising representatives of ArchivesSpace member categories (Charter Members only in year one). The Board of Trustees has ultimate authority for the maintenance, development, and sustainability of the ArchivesSpace application. ArchivesSpace member representatives who have fiduciary responsibilities at their organization (directors, assistant/associate directors) are eligible for nomination and election. The Board of Trustees has several important tasks that include:

- Ensure that the ArchivesSpace application meets the needs of the greatest number of ArchivesSpace members;
- Review and prioritize development of the ArchivesSpace application per advice from the Users' Advisory and Technical Advisory Councils;
- Review and approve proposed development and technical infrastructure roadmaps;
- Control the fiscal accounts of the ArchivesSpace program, including advising on fundraising activities and contracted development; and
- Oversee the Users' Advisory and Technical Advisory Councils.

The official governance document that provides details of governance for the first two years of ArchivesSpace may be found at http://www.archivesspace.org/wp-content/uploads/2013/07/ArchivesSpace_Governance_Brochure_20130715.pdf

Membership on the three governance boards is restricted to Charter members for the first year of operation, June 2013-July 2014. Beginning July 2014, General members can begin serving on the boards, and Service partners can begin serving on the Technical Advisory Council. Service Partner is the option for consortia, or organizations or agencies representing a group of institutions, since membership is restricted to individual institutions. The benefits and costs for Charter Members, General Members, and Service Partners are presented in the table located at the beginning of the "Membership Services" section below.

[Will any of the governance groups help inform membership categories, structure, prices, and services?](#)

The membership categories, prices, and services are based on copious research and deliberations. No changes to these are expected in the near-term future; in the longer term, ArchivesSpace sustainability is the responsibility of the Board.

Any changes necessary to sustain the community, application, and support development needs would be discussed and approved by the Board of Trustees. Request for changes may come from the Users' Advisory or Technical Advisory councils or the general membership.

[How will surplus membership fees be used \(i.e., a reserve fund, special projects\)? Does a governing body have input into that decision? Could it lower membership fees for following years?](#)

There is no expectation that membership fees will exceed the budget requirements of ArchivesSpace for the first several years; thus, there is no position yet on how surplus fees would be used.

In the unlikely event of a surplus of membership fees in the near term, there are at least three strategies the Board may determine for using them:

- Create an "emergency fund" to ensure that annual costs are met, even if there is a decrease in paid membership fees;
- Hire staff, including short-term staff, to address needs for the application identified by the community;
- Create a fund for short-term, strategic development sprints to address key needs quickly.

LYRASIS and ArchivesSpace are non-profit enterprises. Revenues generated from the ArchivesSpace community are designed to support the ArchivesSpace community, as well as sustain and advance the ArchivesSpace application.

[Members in good standing are eligible to be appointed to govern, according to the brochure. Is there a definition for "good standing"?](#)

Members in good standing are members who have paid their membership fees. There are no other requirements to be a member in good standing, though active participation in the ArchivesSpace community is strongly encouraged.

[Are the project partners \(NYU, UCSD, and UIUC\) considered charter members? Will they have a different role than other members in governance?](#)

Yes, the Project Partners (NYU, UCSD, and UIUC) are all dues paying Charter Members at the outset of the ArchivesSpace collaborative. Like other ArchivesSpace members, the partners will pay dues annually. However, unlike other members, the partners will each have one seat on the Board of Trustees for a period of five years from the beginning of the ArchivesSpace collaborative. This privilege reflects the responsibility of each partner for the success of the ArchivesSpace collaborative, as well as their commitment to the Andrew W. Mellon Foundation for sustaining the ArchivesSpace application after the end of the funded project phase.

[How will ArchivesSpace ensure that the diversity of all users is represented in matters of governance, improvements, and sustainability? Will there be "at-large" seats to represent users groups who are not members? Will there be any reserved seats to ensure equitable representation by large institutions, small institutions, academic institutions, corporate repositories, etc.?](#)

The ArchivesSpace governance groups are designed to represent the diversity of ArchivesSpace members. Each group has representational spots reserved for members from each of the member categories. Appointment to the governance groups is designed to ensure representation of the various segments of the archives community, including large and small repositories, and repositories that are academic, government, corporate, etc. Representation from all these segments in the governance groups

will ensure that all segments have a voice and the opportunity to participate in ArchivesSpace development.

There will be no “at-large” seats for representing users who are not members.

Can you clarify what the Technical Advisory Council will be charged with? How will that be different than the work of the hired (and paid) software developer on staff? Will this committee utilize skills and people who are users but not members?

The Technical Advisory Council has several distinct tasks; in order of importance, they are to:

- provide overall technical guidance to the Board of Trustees, the User Advisory Council, and the general community;
- review contributions for possible inclusion into the code base;
- review functional enhancements and their prioritization identified by the Users’ Advisory Council
- Make recommendations to the Board for priorities for major new or re-development areas;
- designate code committers based on nominations from the community and evidence of quality workmanship;
- develop guidelines for review and testing of all code contributions; and
- collaborate with ArchivesSpace staff at LYRISIS to communicate development needs to the community of developers

This work will complement and augment the day-to-day work of the ArchivesSpace developer hired by LYRISIS. That developer will participate in all the tasks identified for the Technical Advisory Council, as well as serve in an ex officio member of the Council. S/he will, of course, be expected to write and contribute code for the application, though this person is not expected to be the sole coder for ArchivesSpace. The Technical Advisory Council will have a sub-group of code committers that also contribute code, run releases, patch bugs, etc. The ArchivesSpace developer has responsibility for compiling and packaging all new releases and posting them to GitHub.

The contribution of code is anticipated to come from many sources, including ArchivesSpace members and non-members. Because code contribution is a separate activity of the Technical Advisory Council, not all code contributors need be Technical Advisory Council members. ArchivesSpace Service Partners, however, are eligible to serve on the Technical Advisory Council. All code developed will be subject to approval by the Technical Advisory Council. Approval of submitted code will be determined by how well the submitted code contributes to the refinement and advancement of the ArchivesSpace application, as determined by the Board of Trustees.

Membership Services

Can there be explicit clarification of the services and benefits of membership? Specifically, a side-by-side comparison of the services offered to a non-member, regular member, and Charter member, would be helpful.

Services/Benefits	Charter Members	General Members	Service Partners	Non-Members
Ability to participate in ArchivesSpace governance groups	All groups; exclusive right in year 1 (July 1, 2013-June 30, 2014)	All groups; beginning July 1, 2014	Technical Advisory Council only	none
Access to ArchivesSpace application and all updates	yes	yes	yes	yes
Access to technical documentation	yes	yes	yes	yes
Access to User Manual components	<ul style="list-style-type: none"> • User manual • Contextual help • Tooltips • Video tutorials 	<ul style="list-style-type: none"> • User manual • Contextual help • Tooltips • Video tutorials 	<ul style="list-style-type: none"> • User manual • Contextual help • Tooltips • Video tutorials 	Tooltips
Access to ArchivesSpace-maintained listservs	yes	yes	yes	no
Access to Help Desk (email, phone support)	yes	yes	yes	no

What documentation will be available for non-members? What documentation will be available only to members?

There are two main types of documentation for ArchivesSpace: User instruction in the form of manuals and video tutorials and technical documentation supporting developers.

- **User instruction components:** “Tool tips”: cues to indicate how to complete a given ArchivesSpace field will be included in the open-source software package and available to everyone. User instruction, in the form of online contextual help, application user manual, and video tutorials will be restricted to members.
- **Developer/technical documentation** about the ArchivesSpace application and source code will be open and available on GitHub.

How much support do members receive? Is it a certain number of hours or unlimited support? Is it the ability to join a queue for support time?

We have not established limits on support for members. Support for local installations and migration may come from direct email, phone call, or a post to the member-based list. The ArchivesSpace Program Manager and Developer will be available to respond to Help Desk requests. Additionally, we envision the member support lists will also contribute to problem identification and resolution as they have for Archivists’ Toolkit and Archon.

Does being a member gain guaranteed additional customization? Or is this an “extra” that members and non-members alike pay for?

If customization in this context means the development of new features, then members can make suggestions and recommendations to the User Advisory Council and the Technical Advisory Council to initiate new development. If by customization you mean branding a public interface, adding additional functionality, etc., we expect to have a list of known developers who will be able to assist with these services.

Can there be clarification on migration services? It has been stated since the announcement that ArchivesSpace will have migration tools available for all, so what’s the added value of migration services for members?

Migration tools will be available to all. However, migration support services will only be available to members. This adds value to membership by providing answers to questions about how to map data that might have been entered in non-standard ways in the Archivists’ Toolkit or Archon. Migration support services will also provide a resource to resolve problems that may arise during the migration.

What is the added value of the merged product for the first release?

The primary added value of the merged product for the first release is the integration in one application Archivists’ Toolkit’s robust collection management and metadata authoring features with Archon’s web access features. In addition, ArchivesSpace offers additional modules for rights management, collection management, recording events (collection management actions), and recording core technical metadata, as well improved workflows and a more robust technical architecture and support infrastructure. We also anticipate that ArchivesSpace will be more intuitive to learn and easier to maintain.

Can information be presented to explain the added functionality in the second release? It would be beneficial for this information to be provided in a way that both technical and non-technical adopters could understand.

The ArchivesSpace governance groups will set development priorities for the second release of the software. The ArchivesSpace Team will pass on a list of enhancement requests that have been gathered during the user testing process. These can be used as a starting point for the Technical Advisory Group to consider for added functionality in the second release of the software. Engaged members will ensure that the information about these functions is accessible to both technical and non-technical adopters and potential adopters.

Membership Structure and Fees: Membership Models

Will membership models, structure, and pricing be reviewed and reevaluated on a regular basis?

The membership model, structure, and pricing will remain in effect for at least two years until complete ArchivesSpace bylaws can be developed and the current annual budget for the program can be evaluated to ensure it is meeting needs. The eventual details related to the membership model and structure could be changed by the ArchivesSpace Board of Trustees, keeping in mind that any changes must continue to fully fund the staff and activities supporting the ongoing use of, access to, and development of the ArchivesSpace application.

Who is determining the fee structure and costs, the ArchivesSpace team, LYRISIS, or both?

The initial fee structure was developed through studies conducted by consultants on behalf of the ArchivesSpace project. Additionally, community conversations took place to discuss a membership option and to define affordable membership prices within the archival community. Strategic budgeting was also conducted to include variations of costs, staffing, support, and potential membership numbers over a five-year period to create an annual budget that would ensure that the required five-year sustainability commitment to the Mellon Foundation could be maintained. These components drove the creation of the fee structure and costs through the ArchivesSpace project. LYRISIS assisted with additional budget studies and supports the fee structure and cost, as designed.

Can there be clarification on the price structures presented for academic institutions so it is clear by looking at the chart what category your institution is in? What qualifies for each category?

For academic institutions, membership is defined at the level of the entire entity, not just the size of the archives and/or library staff, because it is a widely recognized model used for academic institutions (and was recommended by one of the consulting reports). Therefore, the JSTOR categories were adopted as determinants for ArchivesSpace membership. JSTOR categories take several factors into consideration including organizational size, budget, potential users of a resource, etc. Archivists should contact the appropriate person (e.g., Head of Collections or Assistant/Associate Dean or University Librarian) at their institution to obtain its JSTOR category. This will be the ArchivesSpace category for the organization, as well.

For example, how do you define “medium”?

“Medium” would be appropriate if the academic institution’s JSTOR category is Medium.

Community colleges are listed in two different categories? How do they determine which one is applicable?

JSTOR and ARTstor assign community colleges to different categories. A college would need to know their JSTOR/ARTstor classification and match it against the size of community college in order to determine which ArchivesSpace membership category is correct.

Can the membership fee structure be modified to better reflect the budgets in relationship to the size of a repository, rather than the size of the institution?

The current fee structure is designed at the institutional level in part because ArchivesSpace is designed to provide access to collections to all organizational users, not just staff. It integrates the necessary, internal archival management functions with a public interface to those collections and, as with other collections, is an investment for the entire organization.

Will institutions be able to “challenge” the category they are assigned, similar to what libraries can do with regular LYRISIS membership?

Most organizations will already have an existing JSTOR or ARTstor category. These will carry over as the organization’s ArchivesSpace category. Work is being done to create a fair and equitable formula for organizations that do not fall within one of the two existing categorization schemes. ArchivesSpace will entertain “challenges” to categories assigned to organizations outside of the JSTOR or ARTstor schemes, but cannot guarantee that the determination will change.

What will the pricing and services/benefits be for institutions needing hosting for ArchivesSpace? What will the model and structure look like? Will pricing be based on the size of the institution, the number of records in the database, the size of the database, or other criteria? Will there be ranges or different levels of hosting with different service levels?

The ArchivesSpace organizational home activity is completely separate from any kind of hosting service offered by LYRASIS (or any other Service Partner). The organizational home activities and its staff are dedicated to the support and development of the community and application. Organizations seeking a quote for hosted ArchivesSpace services through LYRASIS Digital Technology Services should contact digitalservices@lyrasis.org for more information.

Will those who contribute to the project be given some membership benefits in exchange?

As a community-based project, we hope that all members will want to contribute to the ArchivesSpace community, conversations, or coding, depending upon individual capability. There are no additional benefits currently planned for ArchivesSpace contributors.

Does membership require signing a "member agreement"? If so, what does that include?

There is an ArchivesSpace membership agreement. The principal points of the agreement articulate what a member can expect of ArchivesSpace membership, as well as the responsibilities of ArchivesSpace members (community contributions, fiduciary responsibility to pay membership, etc.). It also articulates the current structure for governance, as well as notes that the Board of Trustees will establish new bylaws to go into effect within two years.

It has been stated that ArchivesSpace members do not need to be LYRASIS members. Are there discounts for LYRASIS members or are they completely separate memberships?

ArchivesSpace is a completely separate member-based entity from LYRASIS. LYRASIS functions as the ArchivesSpace organizational home, which means that LYRASIS provides the organizational, administrative and accounting support and infrastructure for ArchivesSpace. LYRASIS membership is not required to be a member of ArchivesSpace, and there are no discounts for existing LYRASIS members. Each membership is independent of the other.

Membership Structure and Fees: Consortia

Will information (pricing and services/benefits) regarding consortia memberships be made publicly available?

As ArchivesSpace launches, we recognize the need for a healthy ecosystem of service providers and also recognize the traditional role that consortia have played in offering Archivists' Toolkit services, including aggregation of finding aids. However, ArchivesSpace membership is at the individual institution level; consortial memberships are not available. Instead, in recognition of a desire by consortia to offer ArchivesSpace services to its members, the ArchivesSpace program will offer Service Partner relationships to consortia. ArchivesSpace Service Partners will be able to offer ArchivesSpace hosted services, training, enhanced or personalized documentation and be allowed to carry the ArchivesSpace logo, etc. to their community. Consortia may also build add-on services such as aggregation services which are not currently coded within version 1.0 of the ArchivesSpace application. In exchange, they will also pay an annual fee to contribute to the overall financial sustainability of ArchivesSpace because it is recognized that many of the consortia members opting to receive service through their consortia will not become full members of ArchivesSpace. To offset the anticipated financial loss, Service Partners will be charged an annual fee of \$15,000. This number could be substantially reduced if a certain percentage of the consortia members receiving service also become full members of ArchivesSpace. In the best scenario, this could potentially reduce the annual Service Partner fees to \$5,000.

Service Partners will have access to most of the same benefits that full members have with the exception of governance representation. Recognizing that Service Partners have strong interest in the ongoing technical developments to the application, Service Partners will be eligible to serve on the Technical Advisory Council, as well as its subcommittees such as the Code Contributors group and others. Service Partners will not be able to serve on the Board of Trustees or the Users' Advisory Council.

[Will consortia size play a role in their membership fees?](#)

There will not be a consortial membership option. There will be a Service Partner option for consortia that would like to offer joint services to organizations. Service Partners will be assessed an annual fee to so as to contribute to the overall financial sustainability of the ArchivesSpace program.

[Are consortia members being treated differently \(in terms of governance\) than regular, institutional members?](#)

There are no consortial members in the ArchivesSpace membership model. Service Partners, on the other hand, can be a part of the Technical Advisory Group only. They may not serve on the Board of Trustees or the Users' Advisory Council.

Membership Structure and Fees: Decision Making, Involvement, & Other

[What other membership models and fee structures were considered by the ArchivesSpace team to cover necessary expenses?](#)

The ArchivesSpace Team considered a broad range of sustainability models and carefully reviewed all the recommendations of our consultant studies. We examined the leading models used by cultural heritage organizations and in higher education, and we evaluated them against the archival community needs and fabric, which unlike many other communities, varies greatly in size and type. We also conducted surveys to test the reception and appropriateness of various models with the archival community, and we sought advice on a comprehensive range of options along with their pros and cons. This effort and analysis took place over an 18-month period and left few stones unturned.

[Why was the published model chosen over other models?](#)

The published model was chosen for two main reasons: (1) the pricing is intended to be flexible so that any archive can contribute to the ArchivesSpace sustainability effort, regardless of type or size; and (2) a membership model is the most equitable way to obtain the revenues necessary to ensure the continued development and maintenance of the software over time.

[What is the target monetary goal to run ArchivesSpace? Is there a projected budget already developed? Will this be shared with the community to promote transparency and an understanding of how membership fees support ArchivesSpace \(like stakeholders in a company\)?](#)

The ArchivesSpace Team has developed a budget based on revenue and expense projections. The projected budget includes modest administrative expenses and what we consider to be the minimum number of staff required to sustain the ArchivesSpace, i.e. two full-time positions and the equivalent of .75 FTE support staff functions. All expenses have been kept deliberately low in order to be able to offer memberships that are affordable to all types and sizes of archives.

[For example, we know that there are plans to hire 2.0 FTE positions. What percentage of membership fees will directly support their salary and benefits?](#)

Membership fees pay for the ArchivesSpace staff salary and benefits. While 2 FTE will be newly hired for this position, there is also the equivalent of a 0.75 FTE position that functions as support

staff for ArchivesSpace Organizational Home activities, as well as other expenses described in a previous section. A significant percentage of the membership fees are dedicated to salary and benefits and the balance of the annual budget funds activities and costs associated with the ArchivesSpace development infrastructure.

Are membership fees contributing to other expenditures such as administrative costs, technology/services, marketing/publicity, trainings, travel and professional development, etc...?

A modest amount of the ArchivesSpace membership fees will be used to support necessary marketing, training, administrative and technical infrastructure, training and travel for the staff who are dedicated to supporting the software, its continued vitality, and its user community.

Are there opportunities to have software development done without a full-time person (realizing this could, but not necessarily, lead to slower development/other issues)? Examples could include internships for graduate students or short-term assignments/project work. Were these options discussed?

The software development will be led by the developer and the chair of the Technical Advisory Council. A core group of code committers will also assist with code development. The developer position will have a variety of testing, coding, and code release responsibilities that are best accomplished by a single person, not through volunteer coders.

Given above, what was the thinking/practicality of significantly lower membership rates? How does that affect sustainability as it might mean a significantly larger user base, which could end up equaling the same amount of membership income? Were the numbers run to show what benchmarks were necessary?

Yes, the Ithaka report, referenced previously, addressed these issues in great detail. Complex interactive spreadsheets were created to analyze the sensitivity between the cost of memberships and adoption rates, from which benchmarks were identified. For now, this membership model and price structure are the best options devised to support ArchivesSpace.

The ArchivesSpace membership model determines membership categories based on a number of factors, including library operating budget. Was that considered as a model? Or determining categories based on department(s) operating budgets? What about archives staff FTE or number of deployments of ArchivesSpace?

The ArchivesSpace membership model does not determine membership categories solely based on "library operating budget." Because ArchivesSpace is an application that supports both staff and public access to archival collections, the membership model considers the overall organizational budget (Library, Archives, or even Very Large Organization), rather than a department budget, or number of FTE of archives staff as one factor in determining membership categories. Additionally, the existing JSTOR/ARTstor models, being leveraged, take many factors into consideration well beyond organizational budget.

Why are the monetary membership levels so much higher for ArchivesSpace than they are for regular LYRASIS membership, which ranges from \$450-\$1,125 over four categories? (Realizing that there are different user needs and services for these different members and programs, but this is a huge difference. (Relates to question above.)

ArchivesSpace is a completely separate endeavor from LYRASIS. While LYRASIS is serving as its organizational home, it is otherwise unrelated to ArchivesSpace membership. Membership is designed to sustain ArchivesSpace and the membership model was set based upon the research and consultation, as mentioned in earlier answers. The model was not set independently by or based on the model of LYRASIS.

Could there be different levels of membership? For example, if in year 1 of membership, an institution uses the documentation and migration tools heavily, but in year 2 they only use the members-only listserv, is there a price difference?

At this point, membership is included to be all inclusive and is not available at different levels. Because the application will undergo ongoing development with new releases, new technical documentation and user manual updates supporting the new versions, new training, etc., it is unlikely the above scenario would occur. Additionally, it is critical to understand that ArchivesSpace membership is about community engagement and community-governed development. These key aspects should not be considered separate from the tools and added services related to the application.

Could some benefits like the migration tools/services be sold à la carte as packages/modules?

They can be and may be by Service Partners, or by anyone since the software is open source. These kinds of separate services are not part of the membership model.

Is there any opportunity for negotiation of fees and services between the user community and project staff?

The fees have been set through the extensive planning process for sustainability of ArchivesSpace. As responsibility for sustainability transfers to the ArchivesSpace Board, the Board may determine that a different structure is possible in the future. (For example, if the membership base becomes much larger than originally projected.) "Negotiation" with individual institutions is not part of the membership model.

Migration Questions

Will it be possible to migrate data to ArchivesSpace without tools provided to members? What will this look like?

The migration tools will be available as open-source software to everyone--members and non-members--later this year. The tools will be rolled out to Charter members first, followed by General members and then made publicly available on the ArchivesSpace GitHub site.

To answer the specific question, it is conceivable that data could be migrated without the ArchivesSpace tools. However, to do so would require a significant amount of data analysis and alternative mapping or tools development. Taking the time and other resources to create an alternative data migration path would be resource intensive. ArchivesSpace has devoted significant resources to tools development. Programmers on the development team, as well as migration specialists, have developed mappings and scripts. Archivists on the ArchivesSpace team have analyzed the results through an iterative testing process. Migrating data without the ArchivesSpace tools would be equally resource intensive for anyone who decided to pursue that option.

Are migration tools provided for users to implement on their own, or is migration a service provided by ArchivesSpace staff? Or are both options available?

Migration tools will be provided for users to implement on their own. Migration support services will be available to members. It is possible that independent service providers will offer migration services.

ArchivesSpace Community

Can ArchivesSpace provide potential users with advocacy talking points to help them pitch membership to the software to their budget managers, administration, and institution?

Many of the responses to these questions provide information and talking points. The ArchivesSpace team could try to thread some of this into a document, though we'd need to know a bit more of what specifically needs to be included that differs from the variety of brochures and flyers that have already been developed.

[For example, if an organization has had Archon for years that hasn't cost them anything, can ArchivesSpace provide some language to help convince upper administration and budget controllers to begin funding the membership-based software?](#)

Yes, this is possible. Additionally, the Principal investigators have indicated a willingness to talk to their director peers about ArchivesSpace and/or help with talking points.

[Could a Community Board \(open to everybody, including non-members\) be added as part of the Governance structure?](#)

The overarching governance will be provided by the ArchivesSpace Board of Trustees. A community forum could emerge, but it will not have governing powers for the ArchivesSpace program.

[Can there be a Community Listserv that is open to everybody \(either in addition to or as a replacement of the Members-Only Listserv\)? This could help support sustainability and community as opposed to only having one, member-only listserv.](#)

ATART could certainly create a community listserv, or use their existing list, if ATART is interested in providing support to the non-member community. However, the sustainability model for ArchivesSpace does rely on membership and services that are only available to members, as an incentive for membership. Therefore, ArchivesSpace staff will need to focus its resources on a member listserv rather than a general community listserv.

There may be a lack of awareness in the community about how the resources to support AT and Archon are currently being provided. The bulk of support for both Archivist's Toolkit and Archon has been provided by the organizations that developed the products initially. In the case of Archivist's Toolkit, ongoing funding to support its day-to-day operational activities was made available from the Mellon Foundation, contributing to the staffing and support profile. An important reason for developing a more sustainable product and business model is to remove this burden from organizations that are not being compensated for the resources they are devoting to support. Additionally, the Andrew W. Mellon Foundation will no longer fund operational activities.

[Are non-members able to provide suggestions for improvements to the software? \(user interface, new features, etc....\)](#)

No. Input for development priorities is a member benefit. ArchivesSpace users who are not members may make improvements to the application if they wish, and it is our hope that these changes will be contributed back to the community under the same open source license as used for the application (the Educational Community License version 2.0).

[How can the ArchivesSpace project team work with the established community base of ATART? How can ATART help facilitate communication, work, etc. between ArchivesSpace and the ATART community?](#)

The ArchivesSpace team has been working with the established community through the planning grant and the current grant-funded project on specifications for the ArchivesSpace application, development priorities, testing functionality, and usability. The ArchivesSpace project team will disband in August 2013 at the end of the grant-funded project.

The best way for ATART to help facilitate communication, work, etc. between ArchivesSpace and the ATART community is for ATART leaders to recommend that their organizations join ArchivesSpace as members.