

# *Planning for a rainy day: ensuring sustainability*

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Digital Resource Management from Data to Knowledge  
21 – 23 July 2009, Durban, South Africa



# Sustainability is ...

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- ▶ “having a mechanism in place for generating, or gaining access to, the economic resources necessary to keep the intellectual property or the service available on an ongoing basis”  
*(Sustainability and Revenue Models for Online Academic Resources (2008))*
- ▶ continued existence of a digital collection beyond the creation of that collection
- ▶ which means ongoing
  - access
  - management
  - maintenance
  - preservation
  - expenditure

# Sustainability requires ....

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- ▶ Focus from the **outset** of the project
- ▶ An “exit strategy”
  - Plan for the future of the collection beyond current funding
  - Collection specific
- ▶ sound preservation *strategies*
- ▶ preservation *policies*
- ▶ documentation

# *Sustainability also requires .....*

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- ▶ Good governance
- ▶ Strategic directions
- ▶ Hybrid business models
- ▶ Cohesive decision making
- ▶ Stakeholder interaction
- ▶ Advocacy
- ▶ Marketing

# more than bits and bytes....

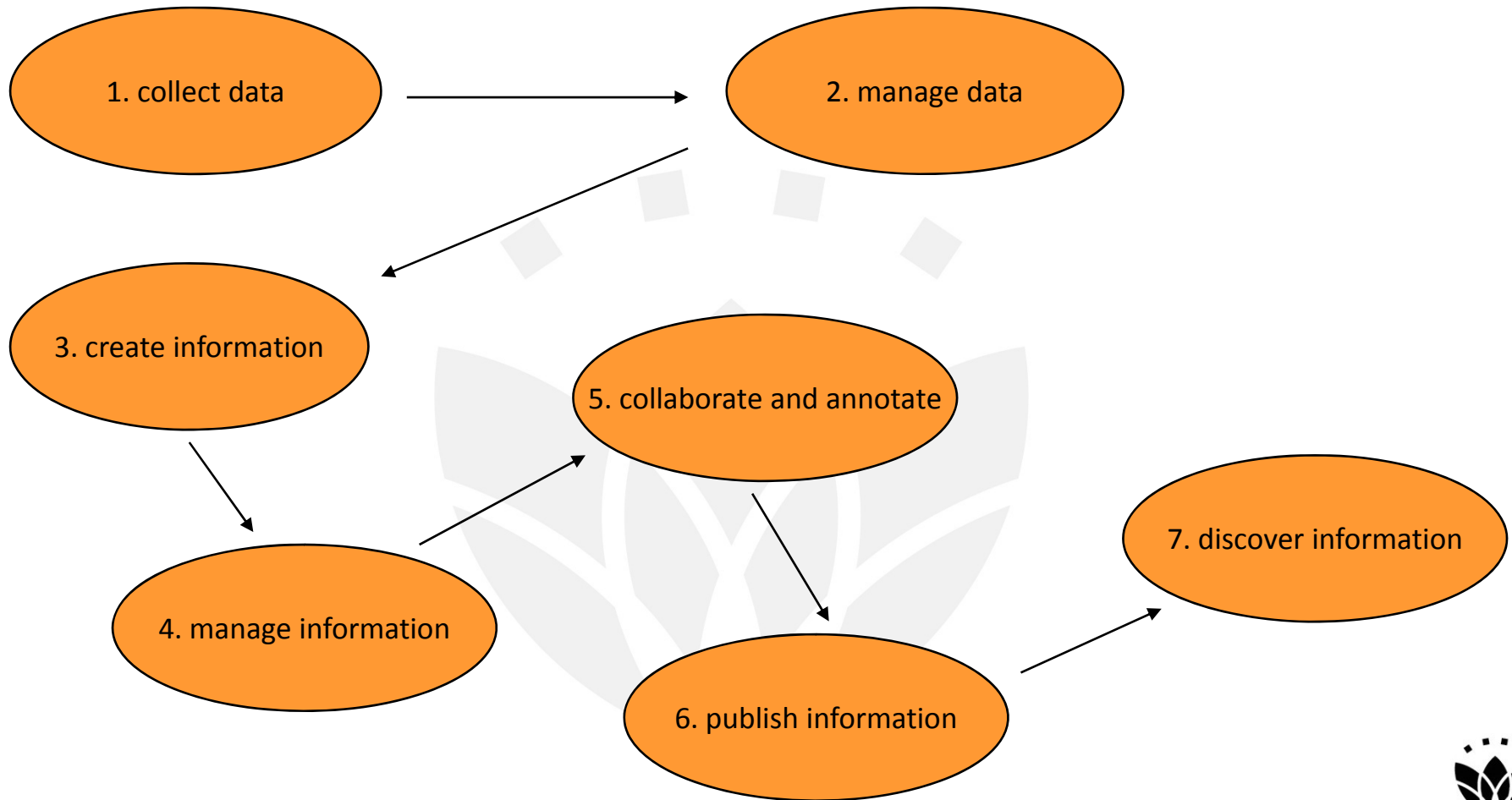
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It is a ...

- ▶ Complex preservation of *digital information*
- ▶ Access to *meaningful* information
- ▶ Integration of the lifecycle of the information object

# Information management

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# Sustainability and preservation

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## SUSTAINABILITY

### *Digital information*

- Technical infrastructure
  - Social infrastructure
- Organisational infrastructure
- Economic infrastructure

## PRESERVATION

### *Digital item*

- Authenticity
- Renderability
- Completeness
- Uniqueness

# APSR initiative

APSR: - Windows Internet Explorer

http://www.apsr.edu.au/

digital sustainability presentations


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Australian Partnership for Sustainable Repositories

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## Australian Partnership for Sustainable Repositories

...to establish a centre of excellence for the management of digital collections

### Open Access Publishing

A two-day user group workshop for existing and potential users of PKP software products was held at the University of Sydney on December 4 and 5, 2008. [Presentations](#) are available.

### The Data Management Plan: Putting policy into practice

APSR is planning a workshop on this topic to be held at the University of Melbourne on August 8, 2008. [Overheads](#) are now available.


In association with the workshop, APSR is pleased to present two new publications.

### Investigating Data Management Practices in Australian Universities


This report by Margaret Henty, Belinda Weaver, Stephanie Bradbury and Simon Porter presents all the findings of the [Data Management Survey](#) conducted at The University of Queensland, The University of Melbourne and Queensland University of Technology in 2007. The report, based on the responses of 879 researchers, covers all aspects of data management including the use of data management plans, storage and backup, data sharing, data ownership and much more.

### ANU Data Management Manual: Managing Digital Research Data at The Australian


### Watch an APSR video about the Open Archives Initiative Object Reuse and Exchange (OAI-ORE)



### Data Management Model Survey conducted in the School of Geosciences at the University of Sydney



### Find out about the Data Management Survey



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# Sustainability of libraries

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- ▶ Global agenda
- ▶ “Exploring sustainability and libraries in a global world” - Conference held in the Hague, in April
- ▶ IFLA SIG at IFLA Conference in Milan, August 2009

# IFLA


How green is my library? | IFLA Website - Windows Internet Explorer

http://www.ifla.org/en/news/how-green-is-my-library

digital sustainability presentations

How green is my library? | IFLA Website

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SEARCH

About this group  
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ENSULIB mailing list

UPCOMING EVENTS  
(Including the past week)

Upcoming event: Session of the "Environmental Sustainability and Libraries" SIG at the IFLA Milan 2009 WLIC  
26 August 2009 (Fiera Milano Convention Centre (MIC))  
[More events »](#)

13 May 2009

## How green is my library?

By Vincent Bonnet and Veerle Minner van Neygen

### Exploring Sustainability and Libraries in a Global World

This was the topic of the fourth Madurodam Conference which took place in The Hague on Thursday, April 23rd.

The conference organised by the *Vereniging van openbare bibliotheken - VOB* (Association of Dutch Public Libraries) brought together 50 participants from Western Europe, with the exception of one American, one Canadian and one South African. The study day was divided into two time slots: the morning was devoted to international experiences, in English. The afternoon was reserved for Dutch experiences, presented by Dutch speakers.

This article provides an overview of the morning presentations. As the introduction mentions: "*Sustainability is a key factor in the politics and*

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# Sustainability of libraries – IFLA leadership

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Prof Dr Claudia Lux – President of IFLA 2007-2009

3 aspects of sustainability and libraries:

1. Provision of professional information on sustainability
2. Solution of sustainability problems within libraries to contribute meaningfully to sustainability
3. Sustainability of libraries – Advocacy activities for sustainability of libraries and library projects

# Sustainability of projects – funding proposals

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- ▶ Proposal – what is it?
  - Written presentation to a third party in order to solicit funds
- ▶ Proposal function?
  - Represents a project or programme
  - Proposes a solution
  - Benefits to funder and organisation
- ▶ Proposal structure?
  - Defines the need
  - Activities to be carried out
  - Hardware, software and other equipment
  - Staff requirements
  - Cost
  - Start and end date

# Hidden pitfalls

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## ▶ Hidden costs

- Organisational overheads
- Ongoing staff training costs
- Fluctuating exchange rates
- Rising equipment costs

## ▶ Overheads

- Services – human resources, technical, financial
- Building
- IT networking

# Core issues

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- ▶ Partnerships
- ▶ Collaboration
- ▶ Expertise
- ▶ Building projects of excellence
- ▶ Measure of success?



# Collaboration

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- ▶ Imp of collaboration
  - Within academic environment
  - Between institution and community – expand to consortial relationships
  - Full circle of giving back to community
  - Similar projects

# Expertise

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- ▶ Shared expertise:
  - Funding proposals
  - Community requirements
  - Funders' requirements
- ▶ Build better relationships with funders
- ▶ Fundraising skills
  - Fundraising is a profession
  - Are librarians good as fundraisers?
  - Leadership



# Regional funding efforts

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- ▶ Develop collaborative projects across regions (geographic/institutional/thematic)
- ▶ Sharing of policy and guidelines – not reinventing the wheel
- ▶ Sharing of skills

# Ithaka report

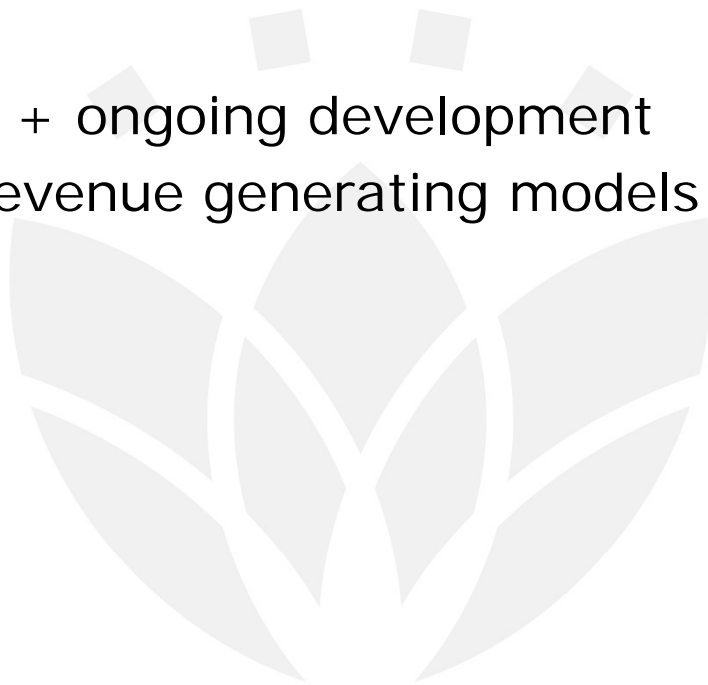


# Wider definition

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*Sustainability is the ability to generate or gain access to the resources – financial or otherwise – needed to protect and increase the value of the content or service for those who use it.*

- ▶ Operating costs + ongoing development
- ▶ Wide range of revenue generating models



# Building and maintaining a digital resource

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- ▶ *Project management and administration*
  - goal setting, strategic planning, staff management, report writing and other activities
- ▶ *Content development*
  - content selection and rights evaluation, content creation, digitisation, metadata generation and quality control
- ▶ *Technological infrastructure*
  - including code maintenance and bug fixes, major redevelopment and feature enhancement and IT/user support
- ▶ *Revenue generation*
  - business planning; marketing, sales and other outreach activities; grant writing (where applicable); and billing and account management

# *Sustainability success hinges on.....*

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## 1. Dedicated and entrepreneurial leadership

- Passion
- Creativity

## 2. Clear unique value of the resource

- Share content
- Content gains value by being used

## 3. Minimising direct costs

- Vendors
- Voluntary workers
- Institutional support in kind

# And ....

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- ▶ 4. Developing diverse revenue sources
  - Subscription
  - Consulting and services
  - Grants
- ▶ 5. Clear accountability
  - Measurement of effectiveness
  - Usage figures

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# *Think sideways*



Edward de Bono



# Contact details

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## References:

- ▶ The future of repositories? Patterns for (Cross-)Repository Architectures.
- ▶ <http://www.dlib.org/dlib/november08/aschenbrenner/11aschenbrenner.html>
- ▶ Sustaining digital resources. Accessible at [www.ithaka.org/ithaka-s-r/strategy/ithaka-case-studies-in-sustainability](http://www.ithaka.org/ithaka-s-r/strategy/ithaka-case-studies-in-sustainability)

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