Digital Repository Service (DRS) Futures Stakeholder Engagement Report

29 September 2023

Background

Harvard Library Digital Repository Service (DRS) has reached the conceptual and operational limits of its current design and implementation after 23 years of successfully managing and preserving more than 10.7 million digital objects, 917 million files, 131 file formats, and 2 PB of data. The repository system has averaged annual growth of between 10-15%. Harvard anticipates increased production and retention of large-scale research data and mass audio/video digitization. These increased content streams will increase data by hundreds of terabytes over the next several years. Consequently, Harvard seeks a new repository system to manage its ever-growing collections.

Harvard has chosen to prioritize three elements in the search for a new preservation repository system:

1) *Technical requirements*
2) *Preservation standards*
3) *Stakeholder experience*

In order to fully understand the stakeholder needs and preferences and incorporate them in the request for proposals, Harvard prioritized a Discovery Phase for the new repository to identify challenges with the current repository system and to think broadly about the solutions offered in a next generation of digital repository services at Harvard Library. The focus of this phase is to identify the needs, goals, and aspirations of the various stakeholder communities within Harvard Library. This phase was focused on blue-sky imagining of the next version of DRS. The challenge in this phase was to encourage stakeholders to imagine broadly and without limitation.

DRS Futures Team Principles

Acknowledging the power of a wide variety of perspectives, the DRS Futures project established a large and diverse team. This team prioritized:

- *Welcoming language*
- *Respect pronouns & identity*
- *Active listening*
- *Amplifying under-represented voices/viewpoints*
- *Offering and accepting critique graciously*
- *Being an active bystander: https://oge.harvard.edu/bystander-intervention*

- *Ensuring accessibility of resources and collections (this would apply to project artifacts, stakeholder engagement materials, and the Digital Repository solution itself)*

These principles of conduct informed the meetings of the DRS Futures Team as well as the stakeholder engagement activities. Throughout this Discovery Phase, the DRS Future team has worked to ensure that every voice was heard and given full and meaningful consideration and response.

In addition to prioritizing diverse representation and engagement, the DRS Futures team has worked to ensure:

- *Transparency – Reports, and priorities are written and made accessible to the entire Harvard community. The DRS Futures team values transparency as a key way to provide feedback to the entire stakeholder community and keep everyone aware of the project. Materials that have been made available include:*
    - *Open Meeting Summary*
    - *Digital Preservation Repository Service Modernization (DRS Futures) ITCRB Proposal*
    - *Harvard Digital Repository Request for Proposals Announcement*
    - *DRS Futures Survey Results*
    - *DRS Futures Focus Groups Report*
    - *DRS Futures Functional Areas*
    - *Technical Foundational Principles and Basic Requirements*
    - *DRS Futures User Requirements Catalog*
    - *DRS Futures Conceptual Modeling*
    - *DRS Futures RFP Announcement*

- *Accessibility and availability – The DRS Futures team emphasizes that information and participation should be equally accessible and available to all. Whenever possible, stakeholder meetings were recorded, notes made available, reports written and shared broadly, closed-captioning was made available, and multiple opportunities to participate were offered.*
- *Virtual Meetings – The DRS Futures team chose to hold virtual meetings to accommodate the widest possible representation of the Harvard community. Meetings have been grouped by stakeholder interest and community involvement.*

Multiple Communication Paths

In order to engage stakeholders in a variety of ways, the DRS Futures team identified multiple communication paths. These were developed to offer stakeholders different ways to engage with the DRS Futures project as well as ways to deepen the conversation of discovery. Paths included:

Stakeholder Executive Committee Meetings

Quarterly meetings provide the Stakeholder Executive Committee members with an update of current DRS Futures activities and provide the DRS Futures team with the opportunity for guidance and feedback from the Stakeholder Executive Committee. The Stakeholder Executive Committee has been formed to direct the DRS Futures Project and support the work.

Harvard Library Community

The DRS Futures team offered a 20-minute, remote presentation to the All-Library remote meeting on January 12, 2023 at 2:00pm ET. This presentation served as the official announcement of the DRS Futures Discovery phase.

Entire Harvard Community Open Meeting

The Digital Repository Services (DRS) Futures Open Meeting was held on January 25th at 3pm. Participant insights were solicited to help envision the ideal repository and shape the requirements and outcomes for DRS Futures. This 60-minute, remote presentation and meeting will include the Harvard Library, all the professional school libraries, museums, archives, and anyone in the greater Harvard community. Priority on discussion prompts were open-ended questions that will inspire thoughtful feedback.

Harvard Stakeholder Meetings

The DRS Futures team identified key stakeholders with unique insights that should be captured as part of the discovery process. These groups have specific experience with the current DRS and are able to articulate common requests, requirements, and challenges that will need to be addressed in the DRS Futures planning process. These meetings provided additional insight as to which additional stakeholders need to be sought out, which elements are required for future digital preservation work, and more. Scheduled on an ad hoc basis, these meetings provided insight into the ongoing management of the DRS and identified ongoing user preferences and challenges.

Harvard Community Survey

The DRS Futures team created a Harvard-wide, online community survey. Survey questions were developed with a focus on what respondents like about other sites, programs, apps, and services. These preferences were used to determine what features and functions stakeholders valued and what might be imaged for the next-generation of DRS. The survey was opened to respondents on January 30, 2023 and closed on February 17, 2023. A full report on the survey can be read on the DRS Futures project site: DRS Futures Survey Results.

"Office Hours" for the Harvard Community

Concurrent with the survey instrument, scheduled "office hours" were held in order to offer Harvard community members an opportunity to speak to the DRS Futures team about their vision, priorities, and requirements for a next-generation system. The office hours were offered at several scheduled opportunities for drop-in, open-ended discussions.

Focus Groups within the Harvard Community

In addition to the introductory meetings and the survey, several remote focus groups were offered in which community members were invited to have facilitated discussions about the DRS Futures. These focus groups offered an opportunity to engage underrepresented communities as well as already engaged participants. Reports on each of the focus group topics as well as an overview report of the entire focus group experience are available on the DRS Futures Project site: DRS Futures Focus Groups Report

The Stakeholder Engagement experience was analyzed and incorporated with the technical requirements and preservation practices to develop the request for proposals to be released to vendor and open-source solution providers.

Trends in Stakeholder Input

It is helpful to consider the topics surfaced from stakeholder engagement across the entire stakeholder engagement process.

Focus Groups	Survey	All Harvard Open Meeting	Executive Meeting
Self-service and ease of use	Easy deposit/uploading	Easy to use	Improved usability
Interoperability with other systems including metadata syncing and system prioritization	Interoperability with other systems	Seamlessly integrated with other Harvard systems	Easier System Management
Support all formats and support complex file/folder structures	Increasing the content supported by the repository	Able to support all digital formats	Extending the User Community
Bulk Editing and deleting, "shelf-prep" space for processing	Bulk/Batch features	Scalable and flexible	

Table 1. Comparison of Feedback

Stakeholders consistently communicate that their top priorities for the new repository are ease of use, improved usability, strong interoperability and integration with other systems, and support for bulk and batch processing features. In developing the functional and non-functional requirements for the new repository system, these stakeholder priorities were given equal weight with the technical requirements and preservation practices. A clean, intuitive user experience is identified as a significant requirement in the RFP and reflects that ease of use and improved usability is a constant message from all stakeholders.

RFP Scope

Harvard has sufficient storage for its current digital collections and is looking for a flexible, extensible repository management system providing the highest functional levels of preservation service, assurance, and productivity through a clean, intuitive user experience. The system will be interoperable with other systems, including metadata providers and discovery gateways, and provide comprehensive support for asset management and digital preservation. Harvard is not seeking to replace its current storage solution but is open to exploring the possibility of a different storage solution if a compelling repository system requires it.

Harvard would prefer a solution that allows for storage and repository services to function independently, that is, a system in which Harvard is able to change software platforms without migration of data in the storage layer. Harvard requires a system that supports all preservation repository functions while also connecting to existing Harvard systems for cataloging, reporting, access, and delivery to provide a seamless experience to meet the business needs and requirements of our users. The repository system has no responsibility for patron-facing discovery or access; all patron-facing discovery and delivery is the responsibility of other Harvard services. The repository system must provide content and metadata to those separate services as required but is not responsible for performing those roles.