Shared Fedora Development Working Group Charge

2017-09-05

Summary and Background:

The UC campuses are interested in Fedora's ability to serve as a centralized content and data repository. Several UC campuses have been seeking, or have already stood up, Fedora based repositories, most often as Digital Asset Management systems supporting discovery and harvesting interfaces. Additionally, there is notable interest in supporting the development of the Samvera (Hydra) software projects, Hyrax and Hyku. Hyku's multi-tenant support, implemented centrally by a host campus or the CDL, could hold promise for shared infrastructure across multiple UC libraries. However, campus development priorities and application needs are not yet synchronized, making a fully coordinated engineering effort premature.

Therefore, DOC proposes that campuses interested in Fedora repositories pursue a "loosely coupled" approach to design specification, development, metadata definition, performance profiling and testing, and policy formation, focusing on enhanced communication and coordination among UC libraries.

Shared Fedora Development Working Group: Roles and Responsibilities

Interested libraries will direct technical and project staff to participate in greater communication, and pledge to support in-person and virtual meetings with a quorum of colleagues quarterly, at a minimum, taking advantage of Fedora, Samvera, open repository, and other conference schedules whenever possible.

Expected Deliverables:

Outcome of increased communication and planning among development groups should include goal alignment, a reduction in work redundancy, and improved functioning of core Fedora open source software to meet the needs of the UC libraries. Furthermore, the collaboration will enable a more coordinated and rapid expansion of Fedora software functionality for the broader community, and an augmentation of the UC libraries' ability to articulate, architect and implement a shared software implementation. Beyond these immediate gains, a shared development program will support efforts across the system to develop standards around activities such as user policies, content workflow, metadata and rights management, linked data methodologies, and digital preservation.

1. A dedicated Slack channel for sharing development progress will be created and hosted by CDL in the UCTECH team for this workgroup and its DOC liaison. Workgroup will determine whether it should be open or closed.
2. The group will hold a kickoff meeting, possibly at UC DLF, inviting all 10 campuses to send their workgroup delegate, if they have named one. At this meeting, the group will:
   a. Enumerate where campuses are, and hope to be, in their ability to support active cooperation in Fedora software development, design evaluation, QA, and user testing;
   b. Engineer a process capable of collaboratively designing a shared multi-campus Fedora4 implementation that incorporates a functional MVP and roadmap that could eventually provide a useful assessment against Nuxeo;
   c. Discuss to optimally participate in Samvera project software development;
   d. Discuss how to vet additional designs for ingest, indexing, and discovery interfaces utilizing Fedora4 as a repository but investigating alternative indexing (eg. Elasticsearch) and User Experience (UX) patterns.
3. Within two weeks of the meeting, a summary report will be prepared for the DOC group.
4. Within six weeks of the meeting, campuses will optionally commit to a delineated task list and project plan.
5. The group will primarily utilize GitHub's project-based shared repository and notification services to coordinate software development.
6. On an on-going basis, the results of these coordinated activities will be presented at conferences and community gatherings, so that external groups can take advantage of UC efforts.

Membership

Reporting to DOC, the Shared Fedora Development Working Group should be comprised of individuals from the UC Libraries and California Digital Library with technical interest and/or expertise in Fedora repositories their development, metadata management, performance profiling, and policy formation. The group will include technical representatives from at least 6 campuses. Membership, including the project team lead, is solicited and approved by DOC.

The Working Group lead will be Todd Grappone, UCLA.

Campus representatives:

CDL: Brian Tingle, Perry Willett
DOC: Peter Brantley, *ex oficio*
UCB: [no election]
UC Davis: Quinn J. Hart
UC Merced: Jerrold Shiroma

UCSF:	Sven Maier
UCSC:	Ned Henry, Rachel Jaffe
UCSB:	John Ajao
UCLA:	Todd Grappone, Kristian Allen
UCR:	Eric Milenkiewicz
UCI:	Laura Smart
UCSD:	Declan Fleming

Timeline and Process

The group will initiate work in **October 2017**. A report of the working group's activities and proposed next steps should be completed by **August 31, 2018.** Quarterly progress reports to DOC will be used to assess progress and assist in removing progress blockers.