

2020 Open Source Software Survey

Thank you for participating in the LYRASIS 2021 Open Source Software survey. Open Source Software (OSS) is defined as a type of software in which source code is released under a license in which the copyright holder grants users the rights to use, study, change, and distribute the software to anyone and for any purpose. The goal of this survey is to better understand how GLAM (galleries, libraries, archives and museums) institutions interact with and support OSS programs. For the purposes of this survey, OSS programs are defined as community-based programs specifically designed for GLAM institutions, such as FOLIO, ArchivesSpace, and Omeka. OSS programs designed for more universal use, such as Ubuntu or Apache Tomcat, are outside of the scope of this survey.

We appreciate your taking the time to answer this survey in order to achieve the broadest possible response from GLAM institutions of all shapes and sizes. The survey is divided into three sections: (1) funding/supporting OSS, (2) justifying OSS, and (3) evaluating OSS. This survey should take approximately 20 minutes to complete. Please feel free to share the survey with your colleagues for questions outside your job duties. We realize many of these questions require information from more than one person.

At the beginning of the survey you will be asked for your name, institution, and job title. All of this information will remain confidential, and will not be included in any external publications/reports or presentations. We are merely using this information to identify duplicate entries across our distribution channels.

We would also like to define two terms before the survey begins, to avoid confusion:

Institution = your individual gallery, library, archive or museum

Parent organization = if applicable, the larger organization under which your institution falls, e.g. an academic university

* 1. Your Name

* 2. Your Institution

* 3. Your Job Title

* 4. If you are employed at a US academic institution, please indicate your Carnegie Classification of Institutions of Higher Education (<https://carnegieclassifications.iu.edu/lookup/lookup.php>):

- | | |
|--|--|
| <input type="radio"/> Doctoral University – Highest Research Activity (R1) | <input type="radio"/> Baccalaureate College—Diverse Fields (324) |
| <input type="radio"/> Doctoral University – Higher Research Activity (R2) | <input type="radio"/> Baccalaureate/Associate's College: Associates Dominant (149) |
| <input type="radio"/> Doctoral University – Moderate Research Activity (R3) | <input type="radio"/> Baccalaureate/Associate's College: Mixed Baccalaureate/Associate's (259) |
| <input type="radio"/> Master's College and University: Larger programs (M1) | <input type="radio"/> Associate's Colleges: Mixed Transfer/Career & Technical-Mixed Traditional/Nontraditional |
| <input type="radio"/> Master's College and University: Medium programs (M2) | <input type="radio"/> I am employed by an academic institution outside of the United States |
| <input type="radio"/> Master's College and University: Smaller programs (M3) | <input type="radio"/> I am not employed by an academic institution |
| <input type="radio"/> Baccalaureate College—Arts & Sciences (259) | |

5. If your parent organization is not an academic institution, please indicate your institution type:

- | | |
|--|--|
| <input type="radio"/> Public Library - up to 100,000 population served | <input type="radio"/> Independent Archives |
| <input type="radio"/> Public Library - 100,001 - 250,000 population served | <input type="radio"/> Museum |
| <input type="radio"/> Public Library - 250,001 - 500,000 population served | <input type="radio"/> Private/Industrial Library |
| <input type="radio"/> Public Library - 500,001 - 2,000,000 population served | <input type="radio"/> Non-US Public Library |
| <input type="radio"/> Public Library - 2,000,001+ population served | |
| <input type="radio"/> Other (please specify) | |

* 6. How does your institution interact with GLAM OSS? Please select all that apply.

- | | |
|---|--|
| <input type="checkbox"/> We are a founding member of one or more OSS programs | <input type="checkbox"/> We internally use one or more OSS programs within our institution |
| <input type="checkbox"/> We are on a governing board and/or highest level contributor to one or more OSS programs | <input type="checkbox"/> We use OSS through external hosting services |
| <input type="checkbox"/> We financially contribute to one or more OSS programs (e.g. membership) | <input type="checkbox"/> We advocate for OSS through conferences, presentations, focus groups, etc. |
| <input type="checkbox"/> We provide technical contributions to one or more OSS programs | <input type="checkbox"/> We partner with OSS programs and initiatives where we use OSS as a driver for success |
| <input type="checkbox"/> We provide non-technical contributions to one or more OSS programs | <input type="checkbox"/> Our institution prohibits use of OSS |
| <input type="checkbox"/> Other (please specify) | |

7. In what area(s) of your institution do you use OSS? Please select all that apply.

- Digital asset management (e.g. Islandora, Resource Space)
- Library services platforms (e.g. Evergreen Koha, Folio)
- Institutional repositories/institutional publishing (e.g. Dspace)
- Digital exhibits (e.g. Omeka)
- Other (please specify)
- Digital preservation (e.g. LOCKSS, Duracloud)
- Archival management (e.g. MetaArchive, ArchivesSpace)
- Discovery layers (e.g. Blacklight, VuFind)
- Collections management (e.g. CollectionSpace, Collective Access)

8. In instances where you choose not to use GLAM OSS programs, could please indicate the reason(s) why? Please select all that apply.

- Proprietary software is of a higher quality
- Our institution prohibits use of OSS
- OSS is too cost prohibitive
- Not enough technical expertise within our institution to handle the OSS software
- Other (please specify)

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Section 1: Funding/Supporting OSS

This section will cover how/how much institutions contribute to OSS programs, either through financial contributions or staff time devoted to program contributions/governance.

* 9. How much money does your institution directly financially contribute to OSS program(s)?

- We do not financially contribute to OSS programs
- \$1-\$2,000
- \$2,001-\$5,000
- \$5,001-10,000
- Other (please specify)
- \$10,001-\$25,000
- \$25,00-\$50,000
- \$50,000+

10. If you are able, please share where OSS funds come from in your institutional budget?

11. Who manages the budgetary decisions around OSS?

* 12. How much staff time do you allocate to technical contributions (e.g. coding contributions, software testing, technical team meetings)?

- We do not allocate staff time to technical contributions
- <.5 single FTE
- .5-<1 single FTE
- 1 FTE
- 2 FTE
- 3+ FTE
- Other (please specify)

* 13. How much staff time do you allocate to non-technical contributions (e.g. governance meetings, community feedback/voting, user testing)?

- We do not allocate staff time to non-technical contributions
- <.5 single FTE
- .5-<1 single FTE
- 1 FTE
- 2 FTE
- 3+ FTE
- Other (please specify)

14. If you went from only using OSS to actively supporting OSS, what motivated you to start contributing money or resources external OSS efforts?

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Section 2: Justifying OSS

This section will be focused on how institutions justify investment in OSS programs.

* 15. What considerations are most important to your institution in terms of supporting OSS? Please select the top 3:

- Ethical imperative to support open infrastructure
- If OSS delivers a better outcome for our users
- A financial benefit in supporting OSS instead of proprietary
- In-house control and/or customization of software
- Agility to quickly address user needs
- Long-term sustainability of programs and services
- Expanding staff skills
- Other (please specify)

- None of the above

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Section 2: Justifying OSS

* 16. How long has your institution invested in using/supporting OSS programs?

- We do not intentionally invest in using/supporting OSS programs
- <1 year
- 1 year
- Other (please specify)
- 2-5 years
- 6-10 years
- 10+ years

* 17. How does your institutional mission affect OSS adoption?

- Our institutional mission is structured in a way that encourages the use of OSS and/or open infrastructure
- Our institution mission is structured in a way that discourages the use of OSS and/or open infrastructure
- Our institutional mission does not affect OSS decision-making
- Other (please specify)

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Section 2: Justifying OSS

18. If you are able, please share the phrasing in your institutional mission that encourages the use of OSS.

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Section 2: Justifying OSS

19. If you are able, please share the phrasing in your institutional mission that discourages the use of OSS.

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Section 3: Evaluating OSS

This section covers the ways that GLAM institutions determine the qualifications for OSS, their evaluation tactics, and their decision-making about long term OSS maintenance.

* 20. The following options represent common features and/or services that GLAM institutions value – which do you think are better addressed by OSS vs proprietary software?

	Proprietary	OSS
User experience	<input type="radio"/>	<input type="radio"/>
Community relationships	<input type="radio"/>	<input type="radio"/>
Preservation of digital content	<input type="radio"/>	<input type="radio"/>
Digital workflows	<input type="radio"/>	<input type="radio"/>
Integration with other systems	<input type="radio"/>	<input type="radio"/>
Metadata control	<input type="radio"/>	<input type="radio"/>
Speed of upgrade releases	<input type="radio"/>	<input type="radio"/>

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Section 3: Evaluating OSS

* 21. Are the IT criteria used to evaluate GLAM OSS at your institution different from those used to evaluate proprietary software?

- Yes
- No
- Other (please specify)

22. If the considerations at your institution are different for proprietary software vs OSS, please share what those differences are.

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Section 3: Evaluating OSS

* 23. What factors related to OSS product maturity affect your decision making? Please select the top 3.

- Age of product
- Size of community
- Number of committers/contributors
- Software language
- Operating system dependencies
- Organizational home
- None of the above
- Other (please specify)

24. What is the typical lifespan of OSS products within your institution?

	<1 year	1 year	2-5 years	6-10 years	10+ years	I don't know	N/A
Digital asset management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library services platforms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional repositories/institutional publishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exhibits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital preservation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Archival management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discovery layers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collections management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. If you previously used an OSS product but discontinued its use, what factors affected your decision?

Please select all that apply.

The software was no longer updated

Better free products created by commercial competition

Did not like the direction the product/community was taking

Lost access to internal resources (financial or staff time)

Better commercial offerings

Internal champion of the product left the institution

Other (please specify)