Software Preservation Network

PROSPECTUS

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Executive Summary

Since August 2015, the Software Preservation Network (SPN) has sought to increase the preservation of software through community engagement, infrastructure support, and knowledge generation. In its first three years, SPN has operated as a grant funded effort via generous support from the Institute of Museum and Library Services, the Andrew W. Mellon Foundation, and the Alfred P. Sloan Foundation.

A dedicated and growing software preservation community of practice has formed around SPN, as the network provides a platform for disparate project-based and programmatic efforts to align. To date, a range of services and benefits have been built through grant-funded efforts and the volunteer efforts of faculty and staff from dozens of institutions.

The SPN community now proposes a two-year start-up period to scale up SPN's services and operations and to instantiate the Software Preservation Network as a sustainable community-led organization.

This Prospectus describes a two-year start-up initiative and invites participation through membership and sponsorship subscription opportunities. It details the activities and deliverables of our two-year start up period, and also provides an overview of why SPN was founded, what it has accomplished to date, and what it aims to do in the future.

If you have questions about SPN or about this Prospectus, please contact Jessica Meyerson, jessica@educopia.org.

Why Software Preservation Matters

Software increasingly mediates and augments human experience and our understanding of ourselves and our environments. Our digital cultural record relies on software performances that marry a logic of interpretation with physically inscribed 0s and 1s. Domain-specific illustrations of the critical role software plays in the lives of individuals and communities include:

Health

Managing our health today necessitates interactions with an assemblage of humans, machines, and sophisticated software systems that together enable quantified tracking of activity level and vital signs, help us identify the most accurate diagnosis, guide a skilled surgeon in computer-assisted surgery, and manage the growing trail of our digital health record.

Infrastructure

Using wireless sensors attached to roads, bridges, transportation systems, and other public works, "smart infrastructure" enables us to closely track and manage commuter traffic, food distribution, electric grids, and waterways. Software developed by companies like mPrest help integrate and interpret the flow of raw data from disparate sources that can be used to optimize application of these complex systems.[1]

Science and Policy

Predictive models that describe changes to average global temperature over time, such as those used by the Climate Research Unit at the University of East Anglia, are essential to informing local, national, and international responses to the threat of climate change. These responses have far reaching impact—redrawing supply chains, shifting patterns of migration, and reimagining the distribution of geopolitical influence.

Creative Expression

Software is a medium—another means through which people express their values and experiences. A. Michael Noll, an early pioneer in the use of algorithmic processes to create visual art wrote in 1967: "the computer should be portrayed as…an active and creative collaborator with the artist." Digital artwork has since thrived on the web, illustrating the increasingly boundless nature of software. Emphasis on reuse and the dynamic affordances of the web implies heavy use of third-party dependencies (e.g., specific version of Shockwave plugin for Internet Explorer OR Google Maps API) for the re-rendering of a particular creative work.

Software preservation presents significant challenges that no single institution or stakeholder group can address alone. The Software Preservation Network is a vehicle for

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[1] https://www.mprest.com/

collective action— creating a space where organizations from industry, academia, government agencies, cultural heritage, and the public sphere can contribute their different skills and capabilities toward a collaborative solution that will ensure persistent access to all software.[2]

Software Preservation Network: What and How

The Software Preservation Network (SPN) preserves software through community engagement, infrastructure support, and knowledge generation. SPN activities are concentrated in five core areas including Law & Policy, Metadata & Standards, Research, Technological Infrastructure, and Training & Education.

To date, SPN has facilitated coordination of siloed software preservation efforts, aligning project-based and programmatic work across the five core areas. Through our affiliated projects and educational outreach, we are developing tools, guidelines, and workflows that build capacity for a broad range of cultural stewardship organizations to participate in software preservation. Working closely with legal professionals over the past three years, SPN has advanced progress toward ensuring lawful preservation, sharing, and reuse of software. Across all streams of work, SPN has extended its activities to international software preservation partners including UNESCO PERSIST, Software Heritage, and the Software Sustainability Institute.

Sustaining the Software Preservation Network

In 2015, the Software Preservation Network was established to bring together stakeholders interested in a collective response to the software preservation challenge. SPN is supported through a combination of grant funding from the Institute of Museum and Library Services, the Andrew W. Mellon Foundation, and the Alfred P. Sloan Foundation, as well as with substantial in-kind contributions from over thirty participating organizations and individuals. We are proposing a shift from exclusively grant-funded and in-kind support model to a self-sustaining member-driven organization that will support the ongoing operational costs of the network as well as to support its present and future activities.

We propose to sustain the Software Preservation Network (SPN) through a subscription-funded membership community dedicated to advancing and coordinating software preservation efforts. SPN will enable its members to deliver durable access to the software environments needed to maintain and access their digital collections.

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[2] http://www.softwarepreservationnetwork.org/

Member Benefits

Members who join the SPN organization as either Sustaining Members ($5,000/year) or Supporting Members ($2,000/year) during the two-year start-up period will benefit from access to the following organizational resources and services:

Initial SPN Services and Resources - All members
- Legal strategies and documentation to help ensure lawful preservation, sharing, and reuse of software
- Access to an international network of institutions engaging in software preservation activities
- Metrics to enable ongoing tracking and reporting on progress across project-based and programmatic software preservation efforts
- Networking opportunities, including in-person and virtual meetings, to share practices and make current work more visible and accessible
- Access to a robust communication infrastructure
- Access to shared resources to support organizations in preserving software
- Software metadata crosswalk and recommendations
- Governance structure, legal status, and administrative support for SPN

Additional SPN Resources and Services - All members
Beginning in 2019
- Access to training and professional development opportunities
- Standards development and maintenance support
- Access to emulation tools and environments and the ability to guide development
- Minimal requirements for machine actionable software metadata
- A searchable directory database describing the operations of each member
Beginning in 2020
- Research-in-practice fellowships to encourage experiments and inform future work
- Development support for emulators and technical infrastructure that supports software sharing and reuse
- Agreements/licenses/models to support software licensing and legitimate re-use

Supporting members will also receive the following additional benefits:
- Appointment of one staff member to the Advisory Committee, which provides feedback and advice to the Steering Committee but does not have voting rights during the start-up phase
- Ongoing recognition as a "Supporting Member" in all future SPN work as long as membership is maintained

Sustaining members will also receive the following additional benefits:
- Appointment of one staff member to the Steering Committee, which has voting rights and responsibilities during the start-up phase
- Ongoing recognition as a "Sustaining Member" in all future SPN work as long as membership is maintained

Sponsor Benefits

Sponsors who join the SPN organization as either Maintenance Sponsors ($10,000/year) or Implementation Sponsors ($4,000/year) during the two-year start-up period will benefit from organizational resources and services.

1. Each Maintenance Sponsor will contribute $10,000 or above/yr and receive:
    a. Acknowledgment as a Maintenance Sponsor on the SPN website, with a large logo
    b. Mention in all SPN literature as an SPN Maintenance Sponsor
    c. One representative of the sponsoring organization may attend non-fee-based events such as webinars and roundtable discussions.
    d. The sponsoring organization may send up to two promotional messages per year to SPN's member listserv via the community facilitator.
    e. The sponsoring organization will have the opportunity to present a vendor webinar for SPN members.
2. Each Implementation Sponsor will contribute $4,000 or above/yr and receive:
    a. Acknowledgment as a Implementation Sponsor on the SPN website, with a medium logo
    b. Mention in all SPN literature as an SPN Maintenance Sponsor
    c. One representative of the sponsoring organization may attend non-fee-based events such as webinars and roundtable discussions.
    d. The sponsoring organization may send up to one promotional message per year to SPN's member listerv via the community facilitator.

Large, one-time gifts will be accepted; however, the emphasis will be on annual membership and sponsorship as the basis for sustained support. Donors of large, one-time gifts will be recognized on the SPN website and elsewhere.

Timing

We expect SPN's organizational start-up phase to begin January 1, 2019 and be completed by December 31, 2020.

Budget

This table shows the high-level breakdown of categories and timelines over the two proposed start-up years and a third year to project the operational budget once the network is self-sustaining.

Software Preservation Network Budget	January-December 2019	January-December 2020
Personnel/Benefits		
SPN Program Manager (Educopia Facilitator, FTE)	$80,000.00	$80,000.00
Communications Manager (Educopia, .10FTE)	$7,000.00	$7,000.00
Nonpersonnel		
Meeting Expenses (site, food)		$15,000.00
Travel	$10,000.00	$10,000.00
Computer	$3,000.00	
Working Group Research Awards	$2,500.00	$2,500.00
Contracts		
Graphic Design, Web Development and Maintenance	$10,000.00	$10,000.00
Intellectual Property Consultation (8hrs/wk for $30,000/yr + 20hrs at $250/hr)	$35,000.00	$35,000.00
Educopia Cultivation Services (accounting, organizational infrastructure, governance, policy development)	$20,000.00	$20,000.00
TOTAL	$167,500.00	$179,500.00

Governance and Cultivation

SPN governance currently includes five topical working groups that correspond to the five core areas, one advisory group and one governance group.

During the start-up period, the SPN organization will be incubated by the [Educopia Institute](#), a U.S.-based, not-for-profit organization that fosters inter-institutional collaborations. Educopia Institute has cultivated numerous collaborative networks since 2006, including MetaArchive Cooperative, BitCurator Consortium, and Library Publishing Coalition. As with these networks, Educopia will neither own nor control this entity; it will work with SPN's governance to identify and help secure and/or establish an appropriate organizational model and host entity (e.g., a non-profit, an academic institution, a company specializing in hosting services) for SPN over the course of the two-year start-up period.

The community's leaders will be supported by Educopia through a range of business processes, including formalizing SPN's governance model, ensuring adequate operational reserves for continuity, strengthening communications, and building a strong affiliation model for the range of academic, industry, and non-profit partners this community will include.

SPN will deploy the following governance model for the two-year start-up period:

Steering Committee: The Sustaining Members will each appoint one staff member to the Steering Committee. Steering Committee members have voting rights and responsibilities. The Steering Committee will work with Educopia Incubation Services to establish an operating charter formalizing roles and responsibilities, develop and maintain a set of program objectives and success metrics, coordinate Working Group activities (including establishing mechanisms for onboarding, evaluating, and sunsetting WGs over time), oversee the budget, and help to prioritize services and manage scope. The Steering Committee will also help identify appropriate funding models and recruit strategic partners.

Advisory Committee: Supporting Members each appoint one staff member to the Advisory Committee. The Advisory Committee does not have voting rights and responsibilities. This Committee advises the Steering Committee, provides feedback and discussion on all aspects of program and organizational design, and helps to ensure that the initiative is designed to represent the interests of institutions of all types and sizes involved in software preservation and emulation.

Working Groups: Working Groups will continue to evolve and form as needed over the two years. Working Groups will continue to undertake a significant portion of the community's work using a facilitation model that empowers network members and ensures that work moves forward at an appropriate pace and with clear goals and oversight.

A formal, ongoing governance structure for SPN will be documented and launched as the organization shifts into operational mode in January 2021.

Appendices

Staffing

Program Manager (Educopia): This role will oversee the SPN budget, governance, organizational sustainability, communications, strategic partnerships, and development of the legal/business model to support cultural heritage licensing

Communications (Educopia): A percent of Educopia Communications Manager's time will be dedicated to development and implementation of a communications strategy for SPN.

Graphic Design and Web Development Consultant: SPN will contract with a designer and web developer to migrate the website to a more robust underlying platform that allows for easier editing and maintenance. SPN's website is the home to grant funded project deliverables and working group reports. In order to continue to grow as a source of content, it has to be easy to create and publish new content. The Graphic Design and Development Consultant will be responsible for migration and periodic updates to the site.

Legal Consultant: SPN will contract with a consultant to coordinate efforts with legal clinics and other allies, to engage policymakers where appropriate, and to represent SPN in proposal or petitions that advance the lawful preservation, sharing and reuse of software.

Cultivation Services (Educopia): Educopia will guide the formalization of the organizational and business model for SPN, and will help SPN leadership build necessary skill sets and relationships for sustaining the initiative. This includes training (management/entrepreneurship/facilitation) for community leaders, development of strategic mission objectives and success metrics for a 5-10 year term, development and piloting of community services/products, targeted outreach and messaging for stakeholder communities, and business planning guidance to establish SPN and its services. Cultivation Services also include administrative, financial, and legal support for SPN's organizational issues as well as technical infrastructure (e.g., SalesForce CRM access, Quickbooks/bill.com access, videoconferencing, webinar hosting, project management tools, communication tools).

Workplan

The two-year start-up project for SPN will establish a broad-based, cross-sector, collaborative environment that will foster and encourage the growth and maturation of software preservation services and activities. During the start-up phase, the membership will establish SPN's core activities, as drafted above. The team will also formalize SPN's governance model; solidify its membership and affiliate programs; and establish SPN's business plan, including the financial plan that will support its ongoing work after the initial two-year start-up period. The formal workplan will begin as soon as start-up funding is secured.

Initial months (months 1-4)
Set up meeting schedule, implement the communications platforms, and hire consultants. Begin planning the date, location, and program for the 2019 conference event

Research months (months 5-12)
Conduct an environmental scan, establish the international directory of software preservation programs, and pursue systematic investigation of collective licensing methodologies and model legal agreements. Work with at least two EaaS providers to begin mapping out possible service agreements for SPN members. Develop outlines for advocacy messaging and materials for each of the designated audiences: administrators, librarians, archivists, professors, researchers, genealogists, public historians, technologists, investors, and software providers. This work will help to guide our documentation and governance-model development in the Development phase.

Structure/Model Development months (months 13-19)
Finalize SPN's governance structure and business model. Launch the Software Preservation documentation portal that includes model legal agreements and advocacy messaging and materials for SPN members. Formalize relationships with at least one EaaS provider on behalf of the membership to structure and build EaaS as a service for member institutions. Begin offering training events on a regular schedule to members and non-members.

Transition months (months 19-24)
Secure a longer-term home or host for SPN. We will consider a wide range of options, including non-profits (e.g., CLIR/DLF, LYRASIS, Educopia); academic institutions (e.g., Yale, Cal Polytech, UVA); and association management companies (e.g., FASEB); as well as the possibility of founding a 501(c)3 or other organizational form. All SPN functions will be "live" and launched by the close of the start-up phase. All infrastructure elements built during the start-up phase, including the accounting, HR, SalesForce CRM, listservs, and shared drives/workspaces, are designed for portability such that if Educopia is not the best match for SPN's longer-term home, these can quickly and easily be transferred to a new host or management group, or to SPN itself.

Participating Organizations

SPN has functioned as a volunteer network since 2016. Individuals from these and other organizations have dedicated their time, experience, and creative energy to research, training resources, and designing a sustainable path forward for long-term access to software dependent data:

- California Polytechnic State University
- Canadian Centre for Architecture
- Carnegie Mellon University
- Computer History Museum
- Council for Library and Information Resources
- Emory University
- George Washington University
- Georgia Institute of Technology
- Guggenheim Museum
- Harvard University
- Harvard/Smithsonian Center for Astrophysics
- Living Computers: Museum + Labs
- LOCKSS
- Massachusetts Institute of Technology
- McGill University
- MetaArchive
- Metropolitan New York Library Council
- Microsoft Archives
- New York Public Library
- New York University
- Notre Dame University
- The Ohio State University
- Sasaki
- Software Sustainability Institute
- Stanford University
- StudioGang
- Texas Digital Library
- University of Arizona
- University of California, Berkeley
- University of California, San Diego
- University of Illinois
- University of North Carolina at Chapel Hill
- University of North Dakota
- University of Toronto
- University of Virginia
- Yale University

Membership Structure

SPN membership is open to any organization that aligns with SPN's mission and is committed to an active role in determining and implementing the strategic goals of the network. SPN membership denotes participation in SPN events, committees, and task forces. Members are committed to aligning their local efforts to the software preservation action agenda, which aligns activity within the international software preservation community. All SPN members are ambassadors representing the SPN mission, vision, and values within their professional networks and adjacent communities of practice.

SPN sponsorship is open to any organization that chooses to support SPN's mission and activities through financial contribution.

The membership structure and initial services will be developed over a two-year period and will be supported ultimately by two membership categories and two sponsorship categories:

Membership
1. Each Sustaining Member will contribute $5,000/year in member fees and will appoint one representative to the Steering Committee.
2. Each Supporting Member will contribute $2,000/year in member fees and will not have Steering Committee representation.

Sponsorship
1. Each Maintenance Sponsor will contribute $10,000 or above/yr
   a. Acknowledgment as a Maintenance Sponsor on the SPN website, with a large logo
   b. Mention in all SPN literature as an SPN Maintenance Sponsor
   c. One representative of the sponsoring organization may attend non-fee-based events such as webinars and roundtable discussions.
   d. The sponsoring organization may send up to two promotional messages per year to SPN's member listserv via the community facilitator.
   e. The sponsoring organization will have the opportunity to present a vendor webinar for SPN members.
2. Each Implementation Sponsor will contribute $4,000 or above/yr
   a. Acknowledgment as a Network Sponsor on the SPN website, with a medium logo
   b. Mention in all SPN literature as an SPN Implementation Sponsor
   c. One representative of the sponsoring organization may attend non-fee-based events such as webinars and roundtable discussions.
   d. The sponsoring organization may send up to one promotional message per year to SPN's member listserv via the community facilitator.

Large, one-time gifts will be accepted; however, the emphasis will be on annual membership and sponsorship as the basis for sustained support. Donors of large, one-time gifts will be recognized on the SPN website and elsewhere.

Background on the Software Preservation Network

Currently, libraries and archives worldwide preserve billions of digital objects that document our social, political, scientific, and historical narratives. The value and usefulness of these digital objects hinges on a sizeable, and still largely unaddressed, dependency on the software platforms and environments that are required to render them. Many of these software platforms and environments are commercial and/or proprietary and are not documented or preserved in ways that will ensure long-term access. In the last twenty years, several trends have converged to enable the growth of designated user communities for software including the growth of institutional repositories, funding agency requirements, scalability of bridging technologies such as emulation, increasing reliance on open source software as critical infrastructure, and the rise of "software studies" and related fields of inquiry. The Software Preservation Network (SPN) was initially proposed in response to research undertaken in 2014-2015 including a review of information studies literature, interviews with creators of complex digital objects, and interviews with digital preservation practitioners. SPN was instantiated in 2016 as a volunteer network of individuals and organizations committed to the community roadmap for software preservation.

SPN Mission and Values

Mission

The Software Preservation Network (SPN) preserves and enables long-term access to software through community engagement, infrastructure support, and knowledge generation.

Values

Community

SPN connects and engages the diverse communities of information and communication technology, cultural heritage preservation, law, public policy, social science, science, arts, and humanities organizations that create, use, and curate software.

Sustainability

SPN encourages the software development and research communities to build tools, develop methodologies, create robust documentation, and adhere to practices for software that facilitate long-term access.

Transparency

SPN is dedicated to earning the trust of our broad community through open documentation, open processes, and open standards.

Advocacy

SPN raises awareness for the essential role of software preservation in effective digital stewardship through the combined efforts of collecting organizations, academic researchers, legal experts, software developers, archivists, and media archaeologists.

Accomplishments

Since August 2015, Software Preservation Network has operated as a grant funded effort via generous support from the Institute of Museum and Library Services, the Andrew W. Mellon Foundation, and the Alfred P. Sloan Foundation. A dedicated and growing software preservation community of practice has formed around SPN, as the network provides a platform for disparate project-based and programmatic efforts to align. Our work to date includes the following:

Coordination

Center of gravity for software preservation - SPN currently collaborates with international partners such as the Software Sustainability Institute, UNESCO PERSIST, and Software Heritage on the development of outreach materials and a broad action agenda for software preservation. SPN also collaborates with more broadly scoped membership organizations such as the Digital Preservation Coalition, Council for Library and Information Services, METRO, and the LOCKSS Alliance.

Alignment

Mapping the landscape - The SPN Metadata Working Group has surveyed and synthesized available resources addressing technical and descriptive metadata for software. SPN also maintains a landscape map that illustrates the relationships between software preservation stakeholders, and between a variety of stakeholder groups and the core activity areas of the network.

Action agenda - SPN Governance group members are currently developing a draft action agenda that combines desired future state for each of the five core activity areas, phase progression (roadmap), and a method of measurement that tracks past, current, and existing programmatic and project-based work according to phases. Priorities for action are called out with suggestions for existing organizations that could contribute based on their mission and strategic priorities.

Domain-Governance model - Through discussions with network participants and Advisory Committee members, SPN has constructed an initial organizational model that emphasizes action-agenda horizontals and domain verticals. Action-agenda horizontals correspond to the five core activity areas of the network: law & policy, metadata & standards, training & education, research, and technological infrastructure. The domain vertices correspond to domain-specific communities that map to subcategories of software including art, video games, and software research.

Participatory design - The Andrew W. Mellon and Alfred P. Sloan-funded "Scaling Software Preservation and Emulation" (EaaSI) project (2018-2020) builds on previous work to apply the Emulation-as-a-Service (EaaS) model for access and use of preserved software and digital

objects.[3] The project is focused on scaling the technological framework necessary for multiple institutions to configure, share, and access software and configured environments. EaaSI works with a distributed, community-driven architecture that sits on top of existing digital preservation infrastructure. This directly complements parallel SPN efforts to address key aspects of software preservation including legal advocacy, research about local software preservation needs, institutional capacity building for software preservation, collection development, professional development and training, and workflow recommendations.

Building Capacity

Removing barriers - SPN works in close collaboration with legal scholar-practitioners to better understand the legal landscape regarding software preservation/curation activities. Specifically there are two current, complementary efforts underway to establish a clear a path forward for cultural-memory practitioners, administrators and users to lawfully preserve, reuse, and share legacy software.

Anti-Circumvention Exemption for Software Preservation - In addition to our ongoing research collaboration (with sincere appreciation to Chris Bavitz, Managing Director of the Cyberlaw Clinic)[4], The Cyberlaw Clinic at Harvard Law School (part of the Berkman Klein Center for Internet and Society), is represented SPN and the Library Copyright Alliance (LCA) in the most recent 1201 triennial rulemaking procedures to evaluate and grant exemptions to the anti-circumvention provisions in US copyright law.[5] In December 2017 Kendra Albert, Clinical Instructional Fellow at the Cyberlaw Clinic[6], and Cyberlaw Clinic students Evelyn Chang and Anderson Grossman filed a petition requesting that the Library of Congress Copyright Office grant cultural heritage/memory institutions an exemption to circumvent technological protection measures in order to preserve computer programs and computer program-dependent materials.[7] Mx. Albert and Cyberlaw Clinic students worked with SPN participants and other participants in the April 2018 hearing in Washington, D.C. SPN continues its partnership with the Cyberlaw Clinic in 2018. The U.S. Copyright Office will announce its decision in Fall 2018.

Fair Use Best Practices for Software Preservation - In 2017, the Alfred P. Sloan Foundation awarded the Association of Research Libraries (ARL) a research grant to develop community best practices surrounding software preservation as a way to outline clear guidelines for the application of fair use to the preservation of software and software dependent materials. The project will result in a Code of Best Practices in Fair Use for Software Preservation. The first report from the project was published in February 2018 and it is entitled The Copyright Permissions Culture in Software Preservation and Its Implications for the Cultural Record.[8] The report reflects the synthesis of the literature as well as extensive first-person interviews with researchers, digital preservation practitioners, and other software preservation/curation

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[3] http://www.softwarepreservationnetwork.org/eaasi/
[4] https://clinic.cyber.harvard.edu/bio/christopher-t-bavitz/
[5] http://www.librarycopyrightalliance.org/
[6] https://clinic.cyber.harvard.edu/bio/kendra-albert/
[7] http://clinic.cyber.harvard.edu/files/2017/12/Software-Preservation-Opening-Comment.pdf
[8] http://www.arl.org/storage/documents/2018.02.09_CopyrightPermissionsCulture.pdf

stakeholders. The report also documents widespread frustration around copyright issues in the software preservation community and suggests deeper engagement with fair use as a possible solution. SPN has provided this project with a consistent point of access into the software-preservation community.

Both the 1201 exemption process and the Code of Best Practices in Fair Use for Software Preservation are crucial steps in reducing real and perceived risks for collecting organizations associated with software preservation and to explicitly articulate latent points of alignment among software-preservation stakeholders. Additionally, by exploring existing legal tools for legacy software, both of these efforts reduce the number of software titles that require licenses for long-term access.

Education and raising awareness - IMLS funding for The Software Preservation Network: Towards a National Strategy for Software Preservation [IMLS grant lg-73-15-0133] enabled SPN to bring together representatives of the cultural-memory community in August 2016 and synthesize the needs, activities, and opportunities they identified. This work resulted in a draft community roadmap that has subsequently evolved into a governance model and action agenda that align the core activity areas of the network.[9] Since that forum, SPN members have participated in 12 different conference presentations and discussion sessions. Additionally, SPN Training and Education Working Group designed a six-episode webinar series[10] co-sponsored with the Digital Preservation Coalition that ran April 25, 2018 to May 30, 2018.[11] The webinar series surveyed software preservation activities and use cases.

Broadening participation - The Fostering a Community of Practice: Software Preservation and Emulation Experts in Libraries and Archives (FCoP) [IMLS grant RE-95-17-0058-17, 2017-2020] project is broadening participation in software preservation and empowering librarians, archivists, and curators to address together the key challenges to providing long-term access to software-dependent cultural heritage.[12] Projects undertaken by cohort members advance digital preservation practice and inform field-wide understanding. The activities and documentation produced by cohort members will also serve in parallel efforts to bring software preservation and access into mainstream digital preservation practice (addressing specific legal, metadata, and technical preservation and access challenges).

[9] https://docs.google.com/spreadsheets/d/1pqz4ZfizdOf0jYadMoX4nzdha9LpbjNJoaK0geyHUek/edit#gid=0

[10] http://www.softwarepreservationnetwork.org/events/

[11] https://www.dpconline.org/news/spw-registration-open

[12] http://www.softwarepreservationnetwork.org/fcop/

Software Preservation Network

Participation Agreement

Your support will enable your institution to participate in the evolution of the Software Preservation Network (SPN) from a grant-funded, volunteer-based network into a robust, subscription-funded membership community dedicated to advancing and coordinating software preservation efforts.

By providing a range of legal, technical, coordination, and professional development activities, SPN will enable its members to deliver durable access to the software environments needed to maintain and access their digital collections.

There are two membership categories and two sponsorship categories at this time. These categories are designed explicitly for the two-year transition that will shift SPN from a grant-funded project to a thriving membership community. For more information about this transition, please see the SPN Prospectus (released September 2018).

Member Benefits (active participants in the development of SPN)

Members who join the SPN organization as either <u>Supporting Members</u> ($2,000/year) or <u>Sustaining Members</u> ($5,000/year) during the two-year start-up phase will benefit from a range of organizational resources and services (for a full list, see the SPN Prospectus, released September 2018):

Supporting Members ($2,000/year)
1) Appointment of one staff member to the Advisory Committee, which provides feedback and advice to the Steering Committee but does not have voting rights during the start-up phase
2) Ongoing recognition as a "Supporting Member" in all future SPN work as long as membership is maintained

Sustaining Members ($5,000/year)
1) Appointment of one staff member to the Steering Committee, which has voting rights and oversight responsibilities during this two-year start-up phase
2) Ongoing recognition as a "Sustaining Member" in all future SPN work as long as membership is maintained

All members (Sustaining or Supporting)
1) Legal strategies and documentation to help ensure lawful preservation, sharing, and reuse of software
2) Access to an international network of institutions engaging in software preservation activities
3) Metrics to enable ongoing tracking and reporting on progress across project-based

and programmatic software preservation efforts
4) Networking opportunities, including in-person and virtual meetings, to share practices and make current work more visible and accessible
5) Access to a robust communication infrastructure
6) Software metadata crosswalk and recommendations
7) Governance structure, legal status, and administrative support for SPN
8) Access to training and professional development opportunities
9) Standards development and maintenance support

Sponsor Benefits (financial support without active participation)

Sponsors who join the SPN organization as either Maintenance Sponsors ($10,000/year) or Implementation Sponsors ($4,000/year) during the two-year start-up period will benefit from a range of organizational resources and services (for a full list, see the SPN Prospectus, September 2018)

Maintenance Sponsors ($10,000 or above/year):
1) Acknowledgment as a Maintenance Sponsor on the SPN website, with a large logo
2) Mention in all SPN literature as an SPN Maintenance Sponsor
3) One representative of the sponsoring organization may attend non-fee-based events such as webinars and roundtable discussions
4) The sponsoring organization may send up to two promotional messages per year to SPN's member listserv via the community facilitator.
5) The sponsoring organization will have the opportunity to present a vendor webinar for SPN members.

Implementation Sponsors ($4,000 or above/year):
1) Acknowledgment as a Implementation Sponsor on the SPN website, with a medium logo
2) Mention in all SPN literature as an SPN Maintenance Sponsor
3) One representative of the sponsoring organization may attend non-fee-based events such as webinars and roundtable discussions
4) The sponsoring organization may send up to one promotional message per year to SPN's member listerv via the community facilitator.

Large, one-time gifts will be gladly accepted; however, the emphasis will be on annual membership and sponsorship as the basis for sustained support. Donors of large, one-time gifts will be recognized on the SPN website and elsewhere.

Participation Agreement

Upon completion of this form, an invoice will be sent separately to your organization.

My Institution, _____, (fill in name of institution)
pledges to participate in the two-year evolution of the Software Preservation Network from a
set of grant-funded initiatives to a stable community with independent and ongoing
revenue to support its growing roster of services, tools, and activities.

Participation Type (circle one):
( ) Supporting ($2,000/year, invoiced annually)
( ) Sustaining Member ($5,000/year, invoiced annually)
( ) Implementation Sponsor ($4,000/year, invoiced annually)
( ) Maintenance Sponsor ($10,000/year, invoiced annually)

Signature by Authorized Representative of Institution:

_____

Signature   Date

_____

Print Name   Title   Email

_____

Billing Address

Signed by Authorized Representative of the Educopia Institute:

_____

Signature   Date

_____

Print Name   Title   Email