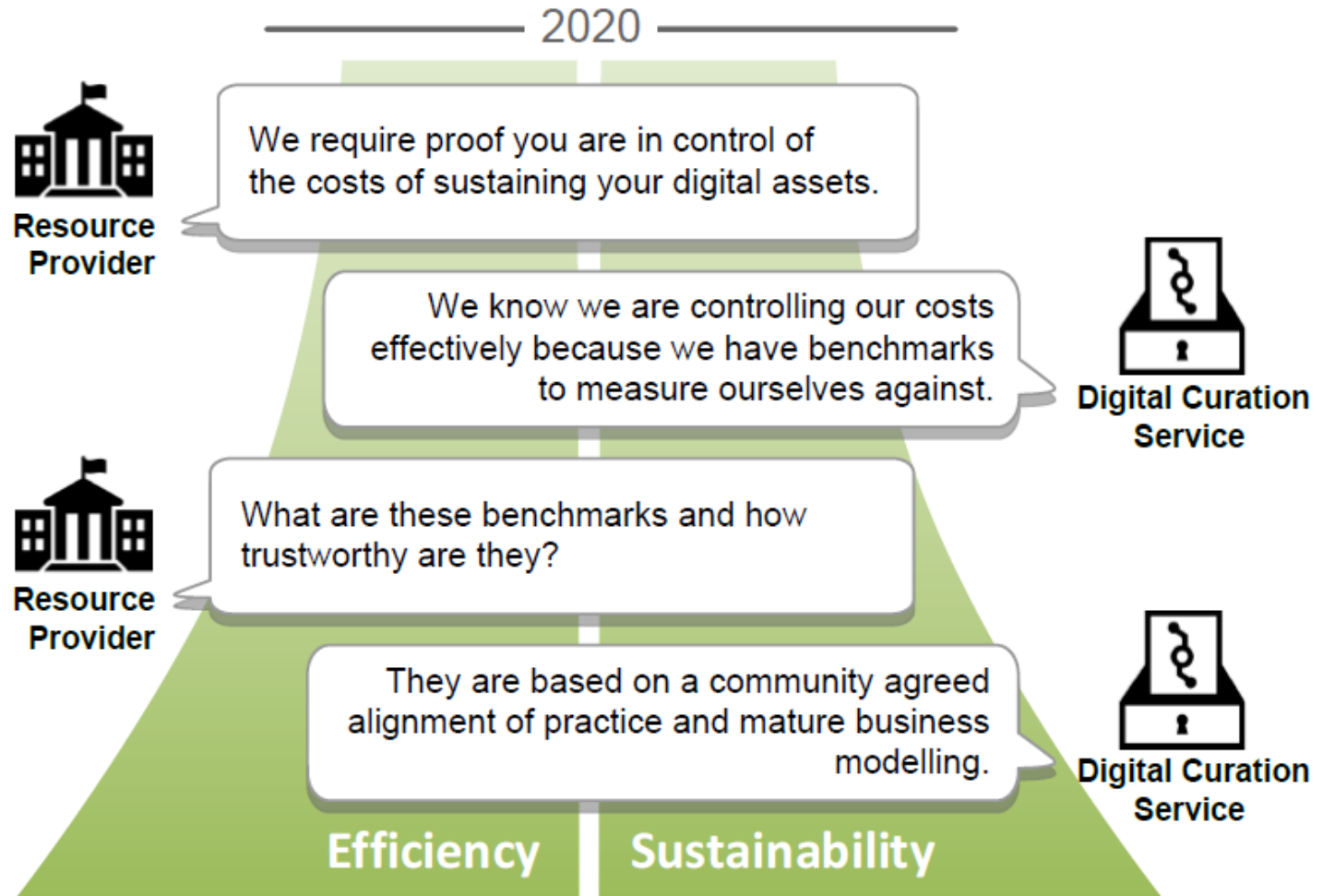# Investing in Curation

A Shared Path to Sustainability
(Draft)

How can organisations working in a variety of different domains more cost-effectively look after and account for the digital assets in their care?

The shape of things to come?

Challenges hindering our attempts to cost curation.

- Lack of data to better understand where we are spending in relation to curation.

- Curation not often included in financial accounting approaches.

- No common agreement on describing data holdings.

- No easy way to compare curation related spending with peers.

- Understanding the value of investing.

The Vision

In five years time (2020) it will be easier to design or procure more cost effective and efficient digital curation services because the costs, benefits and the business cases for doing so will be more widely understood across the curation lifecycle and by all relevant stakeholders. Cost modelling will be part of the planning and management activities of all digital repositories.

Situating the Roadmap in time
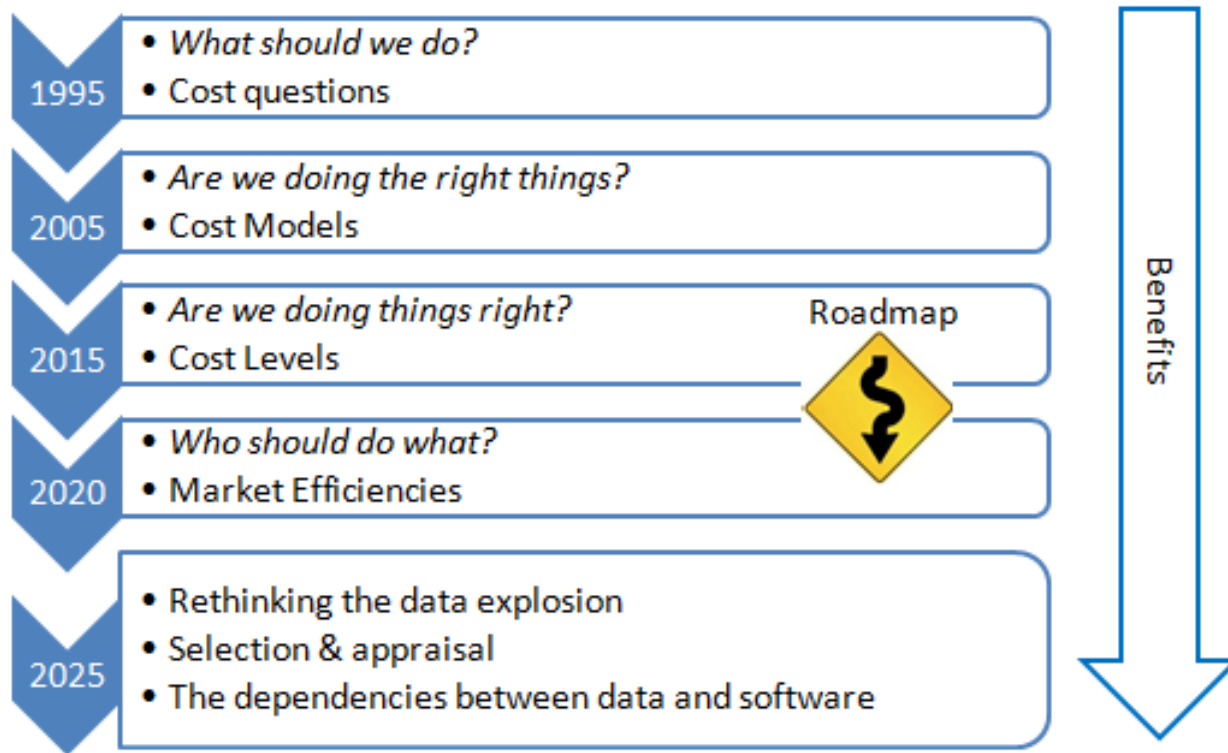
Stakeholder groups

- Curation Practitioners

- Curation Researchers

- Data Users (and Re-users)

- Managers (and Financial Officers)

- Member Organisations

- Policy Makers (Resource Providers / Data Owners)

Message 1

Who	What	When 2015	2016	2017	2018	2019
Curation Practitioners	Lobby management into proper resourcing of selection and appraisal practice and focus on cost-effective digital curation activity	●	●			
Curation Researchers	Conduct research into automatic appraisal and selection techniques based on codified value criteria	●	●	●		
Data Users	Content experts to work with technologists to establish value criteria and represent 'designated communities'	●	●			
Managers	Incorporate the concept of 'value' into strategic and tactical decision-making		●	●	●	
Member Organisations	Help establish relationships between organisations to facilitate the transfer or 'handoff' of digital assets	●	●	●	●	●
Policy Makers	Establish requirements for digital asset value assessment as part of data management and curation planning			●	●	●
Solution Providers	Build on existing tools (e.g. file format registries) to provide automated selection & appraisal tools		●	●	●	

Message 2

Demand and choose more efficient systems

Who	What	2015	2016	When 2017	2018	2019
Curation Practitioners	Establish a common understanding of curation. Share experiences and empirical evidence about tools & methods to provide institutions with baseline curation requirements	●	●			
Curation Researchers	Undertake research work to minimise subjectivity and clarify & standardise definitions of benefits. Develop tools that facilitate the implementation of standards	●	●			
Data Users	Demand better and more standardised interfaces to data and metadata making data more usable and thus demonstrating its value	●	●			
Managers	Setup agreements between organisations to share infrastructure for more efficient utilisation of available resources	●	●	●		
Member Organisations	Evangelise for the standardisation of practice across domains and produce advice & guidance that will help organisations to act upon this message. Work with solution providers & customers to translate and improve system specifications	●	●	●		
Policy Makers	Promote good practice and training so that integrated and standardised digital curation tools and services have a higher profile			●	●	●
Solution Providers	Work with customers and the community to develop, explain and simplify standard practices. Meet customers half-way in specifying solutions and by making pricing models and implementation options clear & understandable	●	●	●		

Message 3

4C

COOPERATION

Who	What	When				
		2015	2016	2017	2018	2019
Curation Practitioners	Make realistic assessments of institutional capability to provide scalable services & infrastructure and compare this with the cost effectiveness & suitability of external service provision		●	●		
Curation Researchers	Optimise workflows and design procedures that will handle large volumes and complex digital objects	●	●	●		
Data Users	Demand delivery of assets and access to resources that suit the needs of users rather than fit within the constraints of current services and infrastructure	●	●	●	●	●
Managers	Setup agreements between organisations to share infrastructure for more efficient utilisation of available resources. Support practitioners to make realistic assessments of local capability	●	●	●		
Member Organisations	Identify and share lessons learnt relating to the economic benefits of using shared infrastructures and the value of planning for scalability over time. Provide a neutral environment to build trust for the negotiation of sharing agreements.	●	●			
Policy Makers	Provide domain-wide shared infrastructures to exploit economies of scale	●	●	●		
Solution Providers	Pay close attention to the need to build scalability into services. Offer solutions that are vigorously tested and provide transparent, benchmarked performance in response to more sophisticated specifications	●	●	●	●	

Message 4

Design digital curation as a sustainable service

Collaboration to Clarify the Costs of Curation

Who	What	When 2015	2016	2017	2018	2019
Curation Practitioners	Work with digital curation service consumers (users) to model the current costs and benefits of digital curation activity	●	●			
Curation Researchers	Continue research into sustainable business models and examine how to standardise divergent current practices	●	●			
Data Users	Methodically and empirically assert the value of digital assets and work with practitioners and managers to undertake cost/benefit analyses		●	●	●	
Managers	Seek proof that digital curation activity within the organisation is: optimally & sustainably resourced; works within a defined supply & demand framework; is providing an efficient & effective service		●	●		
Member Organisations	Provide practitioner advocacy material to promote activities within organisations. Help solution providers to publicise & promote their offerings to enhance the marketplace for services & solutions	●	●	●	●	●
Policy Makers	Provide domain-wide shared infrastructures to exploit economies of scale. Design funding constraints to ensure that sustainable digital curation is underpinned by proven cost-effectiveness	●	●	●		
Solution Providers	Participate in setting standards and focus on long-term interoperability of design in software & infrastructure. Focus on openness & collaboration and building a sustainable & inclusive market place	●	●	●	●	

Message 5

Who	What	When 2015	2016	2017	2018	2019
Curation Practitioners	Collaborate with peer organisations and engage with tools to establish the cost and benefits of digital curation. Be prepared to clarify whole lifecycle costs for managing digital assets	●	●	●	●	
Curation Researchers	Further develop resources that will simplify cost modelling & comparison for digital curation. Engage in additional pathfinder research to refine methods & decrease costs	●	●			
Data Users	Work with practitioners, researchers & policy makers to establish a better understanding of the variable asset value across the digital lifecycle & the impact of digital curation on that value		●	●	●	●
Managers	Establish clarity within organisations about roles & responsibilities for costing curation & resource it appropriately. Provide additional training for finance & accounting staff to understand digital asset management budgeting issues	●				
Member Organisations	Help establish relationships between organisations to facilitate the transfer or 'handoff' of digital assets. Promote tools & methods for whole lifecycle costing and disseminate good practice	●	●	●	●	●
Policy Makers	Identify where the maintenance of digital assets is a priority & design clauses in support agreements that require an estimation of the whole lifecycle costs of sustaining the assets for as long as they may be needed			●	●	●
Solution Providers	Work with practitioners and researchers to build accounting and budgeting modules into curation systems		●	●		

Message 6

4C

COOPERATION

Who	What	When 2015	2016	2017	2018	2019
Curation Practitioners	Devote resources to clarifying the costs & benefits of curation and then share the findings with the wider community. Ask for reciprocal information from others	●	●	●		
Curation Researchers	Examine, evaluate, assess and report on the impact of being collaborative and transparent about costs and benefits information		●	●		
Data Users	Understand the role and purpose of the 'designated community' for curation and ensure that managers & policy makers include users in consultation and steering groups for digital curation initiatives	●	●			
Managers	Ensure that curation activity within organisations is aligned with organisational objectives and that curation practitioners are correctly identifying & emphasising curation benefits when they are outlining curation costs	●	●			
Member Organisations	Synthesise & disseminate the data on costs & benefits and adopt a neutral & universal approach to help all organisations drive down the costs of curation. Foster a culture of trust among members	●	●	●	●	●
Policy Makers	Foster a culture of collaboration to understand the costs and benefits of digital curation	●	●	●		
Solution Providers	Come up with good descriptions of the benefits frameworks and the curation objectives that systems & solutions support to complement clear pricing & costs information	●	●			

To ensure that the roadmap is a convincing, practical and plausible document, we need your views on...

- Are the key messages meaningful to you?

- Do you agree with the messages?

- If the messages apply to you, are you prepared to act on it?

- Are these messages aimed at the right audiences? Who else should be targeted?