Sustaining Digital Resources

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Ithaka S+R: An Overview

- Mission: to help the scholarly community take full advantage of advances in information technology

- We are pursing that mission by
  - assisting organizations and projects with market research and strategic planning to help them innovate and build sustainable digital resources
  - conducting research and analysis on the impact of digital media on the research and learning communities
  - helping the academy to build new models for university-based publishing and digital resource development

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The Sustainability Problem

- Many digital library projects return to funding agencies for additional grants to support core operations once a project is up and running

- Funding agencies are seeking ways to encourage projects to become sustainable after the grant funding period

- Project leaders are seeking ways to support the resources they have developed, beyond grant funding

- Since fall 2007, with the support of JISC, NEH, and NSF, Ithaka S+R has been involved in an ongoing project with the goal of understanding the key factors in developing sustainable digital resources

Sustainability and Revenue Models (2008)

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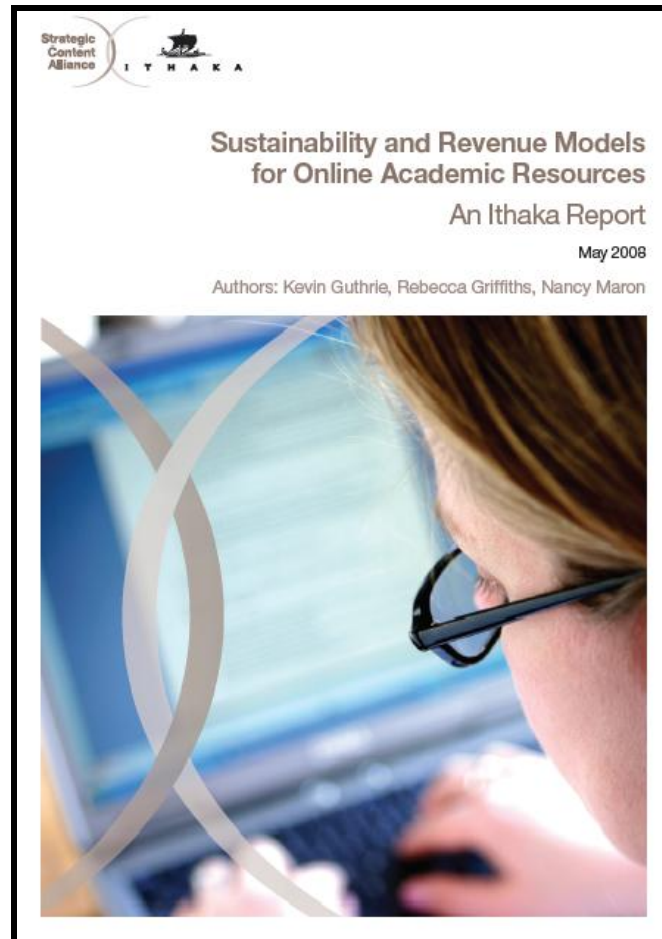
Sustainability and Revenue Models Report (2008) Recommendations

- Project leaders should not assume ongoing grant support

- Sustainability plans should include strategies for future growth, as well as maintenance of the resource

- Digital resources can create value through their positive impact on users

- Projects should consider benefits of scale through partnerships

- In an increasingly competitive environment, strategic planning is critical

- Needs and expectations of users are constantly increasing

- Project leaders must be fully accountable for their projects

- There is a need for continual creativity, risk-taking, and innovation

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From Theory to Practice

- 2008 report on sustainability outlined the mindsets and theoretical strategic shifts needed for digital resources to thrive.

- Feedback from project leaders, funding agencies, libraries, and other stakeholders indicated a need for on-the-ground examples of the strategies that projects employ.

- With support from JISC, NEH, and NSF, Ithaka undertook a second round of research and analysis. Case studies examined 12 projects engaged in creating and sustaining digital resources.

- We explored the evolution of their strategy, the decision-making process, and their cost-containment and revenue-generating models. *Sustaining Digital Resources: An On-the-Ground View of Projects Today* (2009) is the result of that inquiry.

Case study subjects

We chose cases that represented a range of projects spanning:

- Different countries: 6 from UK, 3 from Europe and Middle East, 4 from US

- Disciplines: Science and Humanities

- Different types of institutional bases: libraries, archives, museums, academic departments at universities, government-sponsored initiatives, k-12 educational resources

- Different types of revenue models: subscription, endowment, membership, author pays, licensing, institutional subsidy, government support, public/private partnerships, non-profit partnerships.

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NSDL Middle School Portal Math and Science Pathway

- Part of the larger NSDL digital resource funded by NSF
- Identifies digital resources for teaching and learning, including **community-based web 2.0 tools** (integrating current events into instruction through a blog).
- Sustainability through **user-generated content** and **community participation** by middle school educators and **partnerships with organizations that support middle school community.**

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Findings from the Case Studies

- Sustainability strategies must include **financial stability of the whole resource**, as well as the ongoing value of the content.
- Sustainability is a **dynamic process, requiring continual investment in a resource** to keep up with user needs and the competitive environment.
- Project leaders must be willing to **adapt and alter their business models** as conditions around them change.
- Most projects we studied rely on some **part of their costs being contributed by a host institution**.
- Sustainability models often include **creative cost management** strategies as well as effective revenue strategies.
- **Collaborating with partners** outside of the organization can help to amplify the impact of a project's content, and can result in significant cost savings.

What are some challenges we observed?

- **There is no consensus on which is the right sustainability model**. This is a very difficult problem to solve and experimentation is necessary in order to learn what succeeds.

- **Reliance on a single revenue source can put projects at risk**. Hybrid business models and a portfolio of sustainability strategies is most effective.

- **Hidden cost contributions can obscure the real costs of operating a digital resource**. Leaders must have a clear understanding of total project costs.

- Making the switch from a **"research project" to an "operational resource"** is one of the most difficult but important challenges.

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What contributes to success?

- **Understanding users**: their habits, needs, and preferences, and how these characteristics differ among disciplines.
- **Defining the value of a digital resource** to its user community.
- **Leadership with vision, dedication, creativity, authority, and accountability** for the project's outcomes.
- **Willingness to make difficult decisions** and changes in the project's plan and staff when necessary for its success.
- **Ability to create partnerships** to share costs, gain skills and experience, and build on existing infrastructure.
- **Skill in demonstrating the value of the resource** to its host institution, partners, or collaborators.
- Expertise in selecting, editing, and **contextualizing content for a particular audience.**
- **Ability to lead a hybrid, collaborative organization.**

Next steps:
Business Planning for NSDL Pathways

- SMILE
- CLEAN
- Eco-Ed Digital Library