Sustaining Digital Resources
A Briefing Paper for Leaders of Projects with Scholarly Content

Those who manage digital resources face a significant challenge: finding the resources to support their project and help it thrive. With the support of the UK Strategic Content Alliance and the Joint Information Systems Committee and the US National Endowment for the Humanities and the National Science Foundation, Ithaka S+R has completed a multi-year investigation of innovative funding models to sustain digital projects, culminating in a summary paper and twelve detailed case studies. This document highlights suggestions drawn from this project, and suggests how the examples provided by some of the case studies might be especially useful to projects like yours.

Who is this briefing paper for?

- Project leaders whose digital resources rely upon original work or data submitted by contributors, or on digitised material.

- Faculty members, researchers, library staff, or others at universities and research institutions leading digital content-based projects.

Why is sustainability planning important?

- It can be quite expensive to support continued access, preservation, and development for a digital resource.

- People do not always expect a book or journal article to be updated in a new edition, but they *do* expect websites to be regularly updated and free of broken links.

- Often grants cannot cover these continuing costs alone. Sustainability planning can help project leaders cultivate new funding sources before initial grants run out.

How can this briefing paper be useful?

- This briefing paper will help project leaders understand the key factors that influence the sustainability of resources with scholarly content, and highlights the relevant examples from the set of Ithaka case studies which help point towards ways in which these factors can operate on a practical level.

Key Factors for Sustainability

The report *Sustaining Digital Resources: An On-the-Ground View of Projects Today* identifies five key factors essential for the ongoing success and sustainability of digital initiatives in not-for-profit sectors. (The full report is available here: **http://sca.jiscinvolve.org/files/2009/07/sca_ithaka_ sustainingdigitalresources_with_casestudies_sm.pdf**.)

Dedicated and entrepreneurial leadership

Managing a digital project requires not just an intimate knowledge of the primary content area, but also an appetite for leading staff, planning for long-term costs and revenues, and making sometimes difficult strategic decisions about the future of the resource.

University scholars are not always encouraged to think as entrepreneurs, but the complexity of planning a digital resource demands a pragmatic approach.

Craft a strong value proposition

Developing a rich understanding of the likely users of your resource and the content that will be most valuable to them – keeping in mind that the pool may be larger than scholars in your immediate field, and that they may interact with content in different and unexpected ways online than they would in print – can help focus your efforts, keeping in mind that the value proposition of your digital content may be different for different audiences.

Minimise direct costs

There are many ways to lower direct costs of a digital project, from outsourcing elements of work, to establishing beneficial partnerships, to engaging volunteer support. In some cases, sharing costs across other departments and units within the institution can help; while this can be an effective approach, this practice may obscure the true costs of your project, and possibly put that support at risk should those contributed efforts get cut.

Develop diverse revenue sources

There are a number of earned revenue models for digital academic resources; perhaps the most common is subscriptions, usually to institutions but sometimes to individuals as well. Ensuring open access to research and scholarship are growing priorities at many institutions, so project leaders may need to think about ways to balance that mission with the project's need to generate revenue, by carefully differentiating offerings and the audiences to whom those offerings are targeted.

Clear accountability and metrics for success

Setting clear goals and targets that your project has to meet – both in terms of developing an audience and in meeting financial goals – can help create the conditions for success. While some measures may be common for all institutions (the ability of the project to cover some percentage of its costs through earned revenue), others may fit the broader mission of the specific institution (for example, enhancing the institution's reputation in the primary academic field of the resource).

Whatever these metrics are, it is important for project leaders to think about how to achieve them and how to communicate them to institutional administrators and other stakeholders in the project.

How some projects are doing this today

Leaders of digital scholarly projects on campuses may face a monumental challenge: trying to collect, edit, and disseminate high-quality scholarly content while operating on a shoestring budget. Our case studies provide some examples of how project leaders are:

Adding tools and functionality to enhance the value of the content

Many projects showcase rare or historical digitised material, but merely scanning content and putting it online will not maximise its value to users. **Electronic Enlightenment** digitises collections of letters from 18th-century Europe, and the project leaders have also added intricate hyperlinks between the letters and brief biographies of the often obscure figures. These features help justify its subscription fee to research libraries, which already own many of these letters in print.

To read more, see the full case study on Electronic Enlightenment: **http://sca.jiscinvolve.org/files/2009/07/sca_bms_casestudy_ee.pdf**

Ensuring the scholarly rigor of the resource

Digital project leaders need to build incentives for scholars and others to contribute original content to cutting-edge online projects. These incentives don't have to be financial: the **Stanford Encyclopedia of Philosophy** built in a rigorous editing process with well-known scholars as editors to ensure that junior scholars seeking tenure would be better able to realise long-term career benefits by writing an entry for the resource.

To read more, see the full case study on the Stanford Encyclopedia of Philosophy: **http://sca.jiscinvolve.org/files/2009/07/sca_bms_casestudy_sep.pdf**

Making the case for faculty-led projects to institutional administrators

Project leaders are often highly dependent on the generosity of the project's host university or institution – sometimes for direct funding, but more often for costly contributions like office space. The project leader of the **Thesaurus Linguae Graecae**, an

ancient Greek research resource at the University of California, Irvine, said that she considers it her job to 'educate' current and incoming administrators about her project and it's nearly 40 years on campus.

To read more, see the full case study on the Thesaurus Linguae Graecae: **http://sca.jiscinvolve.org/files/2009/07/sca_bms_casestudy_tlg.pdf**

> *Given that writing grant proposals every two years was kind of an iffy thing, we didn't want to leave [sustainability] to chance – you never know with a referee panel.*

Edward N. Zalta, Principal Editor, Stanford Encyclopedia of Philosophy

Suggestions for further reading

Kevin Guthrie, Rebecca Griffiths, and Nancy Maron. *Sustainability and Revenue Models for Online Academic Resources: An Ithaka Report*. May 2008. **http://sca.jiscinvolve.org/files/2008/06/sca_ithaka_sustainability_report-final.pdf**.

Sharon M. Oster, Cynthia W. Massarsky, and Samantha L. Beinhacker, *Generating and Sustaining Nonprofit Earned Income: A Guide to Successful Enterprise Strategies*. San Francisco: Jossey-Bass, 2004. This guide to business planning for those in the not-for-profit world contains many relevant lessons for digital project leaders, including chapters on developing a marketing plan and 'pitching' your idea to a potential funder or supporter.

Marta Garcia Abadia and Johnny Lin. *Nonprofit Cost Analysis Toolkit*. Boston: The Bridgespan Group, 2009. **www.bridgespan.org/nonprofit-cost-analysis-toolkit-introduction.aspx**. This online guide to determining costs is geared very generally to charitable organisations, but provides templates for gathering costs which may prove useful to practitioners involved in scholarly research projects