Collaborative Repository Toolkit

Communication & User Engagement

How will you communicate with your users? How will you solicit feedback from your users?

A vital component of working collaboratively is communication. Communicating with users about project status updates, feature prioritization, and user study opportunities can take many forms. It is also necessary to communicate externally to prospective users and other stakeholders.

Here are a few examples of communication and user engagement strategies employed by Hyku for Consortia.

- User group meetings: [Hyku Commons User Group Running Agenda](#)
- Blog posts: [Hyku for Consortia News](#)
- Presentations: [Hyku for Consortia Presentations & Demos](#)
- Community Discussion Space: [Hyku Commons Basecamp](#)
- Prioritization Surveys: [Hyku Commons Metadata Development Survey](#)
- Research Plan: [Hyku for Consortia User Experience (UX) Research and Development Plan](#)
- UX Research: [Hyku Commons Phase One User Experience Research Report](#)

Documentation & Training

How will you document processes and provide user instructions?

Having a stable, accessible space for project documentation and training tools is incredibly important when working with users across multiple institutions. You might start with any existing documentation and add more detail as needed. Don't forget to update documentation when changes are made to the software!

Here are a few examples of documentation and training strategies employed by Hyku for Consortia:

- User Guide: [Hyku Commons User Guide](#)
- Training Videos: [Hyku for Consortia Training Playlist (YouTube)](#)
- Documentation Vault: [Hyku Commons Basecamp](#) [Includes screenshot; actual public documents linked elsewhere in this toolkit.]

Staffing and Service Model

How will the shared repository be staffed, and will you share human resources? What services will you provide, and how are workflows managed?

It's essential to know the roles and responsibilities involved in staffing a collaborative repository and to define who will fill those roles. The duties will evolve over time, but frequently keeping an eye on who is responsible for leading services such as training, troubleshooting, prioritization, communication, and strategic direction will be beneficial for the project over the long term.

Here are a few examples of staffing and service model strategies employed by Hyku for Consortia:

- Roles and Responsibilities: [Hyku for Consortia Program Support Roles](#)
- Platform Host and Developer: [Software Services by Scientist.com](#)
- Workflows: [Hyku for Consortia Workflows for Common Activities](#) *[sample]
- Pilot Information/Agreement: [Hyku for Consortia Pilot Participant Role, Expectations, and Acknowledgment](#) *[sample]
- Piloter Toolkit: [Hyku for Consortia Pilot Toolkit: Tenant Managers](#) *[sample]
- Ongoing Support: [Ongoing Support for Consortial Partners in Hyku for Consortia](#) *[sample]

Governance

How will the repository system be controlled, and who makes decisions? Which shared policies need to be created? How will it be funded?

There are many decisions to be made regarding the overall governance of a shared repository. Having a governance system in place will help define who are the key decision-makers, overall direction, role in the community, and financial considerations.

Here are a few examples of governance strategies employed by Hyku for Consortia:

- Vision, Mission, and Values: [Hyku for Consortia Mission, Vision, and Values](#)
- Business Plan: [Business Plan Template](#)

- Partner MOU: [Consortial Partner MOU](#) *[sample]
- Service Level Agreement: Hyku Commons Service Level Agreement *[sample in progress]
- Grant Funding: [IMLS Grant National Leadership Grants for Libraries: Hyku for Consortia: Removing Barriers to Adoption](#) (includes narrative, timeline, and digital product info)
- Community Governance: [Samvera Governance and Philosophy](#)

Technical

How is the repository architected to allow for use by multiple institutions? How will it be hosted and maintained? What will be the processes to create specifications and implement plans for development?

A collaborative repository, particularly one that is open source, presents special technical demands for consideration. Of particular importance is whether or not the repository is multi-tenant, one shared system, or a series of systems. This and other factors (such as technical capacity) inform whether a repository should be hosted locally or through a service provider, and if/how the platform can be customized and improved.

Here are a few examples of technical strategies employed by Hyku for Consortia:

- Structural diagrams: [Structural and Functional Vision](#) and [Collaborative Workflows](#)
- Development Specifications and Management: [GitHub Project Board](#)
- Developer Statement of Work: [Software Services by Scientist.com Hyku Commons 2022 Q4 SOW](#)
- Platform Release/Update Notes: [Hyku Commons Patch Notes](#)
- Maintenance and Support: [Hyku Commons Performance, Problem Reporting, and Maintenance](#)
- Platform Monitoring: [Hyku Commons Production Status - StatusIQ](#)
- Accessibility: [Hyku Accessibility Audit](#)

*Items marked "sample" may not be in current use by Hyku for Consortia.