

Assessing & Refocusing the SCC

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Assessing the State of the SCC Through Feedback

Assessing The SCC

- Why this Effort
- Broad Assessment
- Why Have a SCC
- Long Term Vision
- Shorter Term goals
- Stakeholders in SCC

Assessing The SCC (Cont.)

- Volunteers Roles & Needs
- Staff Roles & Needs
- Committee Models
- Three Major Activities
- Other Issues

Why this Effort

- Why the reassessment:
 - As planned after 13+ months we should review our goals.
 - We have a new Software Curator
 - We understand better some of the issues
 - We are planning to expand our community activities
 - We need and want criteria for success and ... results

Why this Effort (Cont.)

- Process used:
 - 9 plus feedback sessions
 - Proposal for specific activities and areas for further investigation
 - More feedback will be sought
 - Trade studies for actions
 - DO IT
- The data presented is raw
 - It sometimes mixes issues
 - Was only edited for conciseness

- Give general feedback on state of the SCC:
 - Split between:
 - Going Ok, not bad, not great
 - Great dedicated group
 - The chosen task is hard
 - We must have specific projects to maintain momentum and deliver results
 - Stuck at present stage
 - Must improve productivity

Broad Assessment (Cont.)

- Give general feedback on state of the SCC:
 - Comments
 - Small working teams meeting frequently to achieve results, reporting back to SCC
 - We must channel the passion of a strong community of interested parties
 - Working volunteers
 - New curator changes the dynamics
 - Need to document decisions for new volunteers

Why Have a SCC

- Why have a committee and or belong to it?
 - Reasons provided can be grouped as:
 - To collect, to establish a community, to establish an archive, and “others”
 - To collect:
 - To do specific collection projects
 - To determine what needs to be collected and how
 - To save the software 1000
 - To establish or belong to a community:
 - To support the staff
 - To provide resources and advice the museum and other interested collectors
 - To seed and channel a larger community of interested software collectors

Why Have a SCC (Cont.)

- Why have a committee and or belong to it?
 - Archive:
 - Create the software analog to the hardware archive
 - To determine the software collecting unique archive requirements
 - To “test case” the mechanics of a software archive (via collecting)
 - Other
 - Only mechanism to address issue not easily solved elsewhere
 - To deliver results not to attend meetings

Why Have a SCC (Cont.)

- Why have a committee and or belong to it (Cont.)?
- Original answers:
 - Because software is worth saving
 - To support the museum software mission
 - Software collecting and preservation deal with many challenging and unresolved issues
 - Collecting and preserving software will involve and rely on many communities of interested parties

Long Term Vision

- Long term vision of the committee:
 - Answers can be grouped as:
 - To collect, to establish a community, to establish an archive model
 - Collect
 - Save software for posterity:
 - What does it take today to achieve this goal
 - Building out a collection to access and use
 - Preservation of Software artifacts first (availability and exhibits secondary)
 - Save the Software 100 or 1000

Long Term Vision (Cont.)

- Long term vision of the committee:
 - Community of volunteer doing specific collection and preservation tasks
 - Community based software collecting
 - Permanent pool of volunteers for collecting S/W and in advocacy for software
 - Provide to the outside (in conjunction with the museums) resources and sponsorship for collecting
 - Provide to the museum staff, resources and support for collecting
 - Content advisors (collection committee model)
 - Volunteer gathering place

Long Term Vision (Cont.)

- Long term vision of the committee:
 - Establish the archive model
 - Building out a collection to access and use
 - Cooperative effort to define an infrastructure
 - Establish a software collection framework
 - Archive must scale up to support large number of outsiders
 - Contribute to archive as easily as buying from Amazon.com

Long Term Vision (Cont.)

- Original answers in November 2004:
 - Committees don't have long term visions
 - To support the museum software mission through 5 short term goals at first:
 - To develop the policies and procedures necessary to collect, preserve and archive software.
 - To test those standards and processes experimentally on a number of test cases.
 - Establish policy and procedures for ongoing collecting activities.
 - To create an initial list of software that should be preserved in the archive.
 - To get interested groups and individuals collaborating with us on this preservation initiative.

Shorter Term Goals

- Shorter term tasks mentioned in discussion of long term vision:
 - Roles:
 - Improve software collecting profile of Museum (while it establish its software collection)
 - Add pressure on CHM to focus on Software
 - Advisory
 - Taxonomy review
 - Software collecting criteria
 - Procedure for archiving
 - Advise museum on broad policy issues (like copyright)

Shorter Term Goals (Cont.)

- Shorter term tasks mentioned in discussion of long term vision:
 - Collect
 - Establish functional cyber access (not public exhibitions) to current collecting projects (Fortran, NLS, Multics, etc ...)
 - Work on Software 100
 - Work on most endangered software (50's 60's)
 - Loosing early work and people.
 - Software history webpedia
 - Volunteering tasks
 - Help Cataloguing the existing software collection
 - Help with oral history
 - Workshop symposia

Stakeholders in SCC

- Stakeholders (for Committee or Software collecting in general):
 - Hardest question to answer (used some of Len's list)
 - Creators of software
 - SCC Volunteers and other CHM volunteers
 - Active volunteers (from the Museum or outside)
 - Interested parties
 - Outside parties and volunteers
 - Staff
 - Museum
 - Archive Visitors
 - Researchers, Public, etc
 - Posterity

Stakeholders in SCC (Cont.)

- Stakeholders (for Committee or Software collecting in general):
 - Many different groups
 - Too Many may be?
- What's compelling about our system and services that makes the world better for Software collecting
- We must quickly focus on a first priority set of stakeholders and define better their roles and needs
- There next few slides on Wants and Needs are very raw even as a first pass!

Volunteers Roles & Needs

- Raw inputs from indirect feedback
- Volunteers offer
 - Time
 - Expertise
- Volunteers want to accomplish
 - Just to collect by joining or creating projects
 - Have Access to resources
 - Have Access to the collection
 - Help the museum

Volunteers Roles & Needs (Cont.)

- Volunteers need from the Museum (as an institution):
 - Sponsorship
 - Web site, resources, support
 - Long term institutional support
- Need from Staff
 - Common projects
 - Collaboration

Staff Roles & Needs

- Raw inputs from indirect feedback
- Staff offer
 - Specific projects to work on
 - Management decides how to work with volunteers
- Staff wants to accomplish
 - Focus on specific tasks
 - Catalogue the collection etc ..
 - Achieve the goals of Software collecting
- Staff needs from the Museum (as an institution):
 - Web site, resources, support
 - Focus on Software

Staff Roles & Goals (Cont.)

- Staff needs from volunteers
 - Reliable available time
 - Advice
 - A forum for discussion

Volunteers & Staff (cont.)

- Original answers in November 2004:
 - Roles & needs not really covered
 - Stakeholders mentioned:
 - Active volunteers
 - Staff when available
 - Resources
 - Possible equipment support
- We must be more specific on the roles and needs of the first set of selected stakeholders

Committee Models

- A proposed model should be a blend of these committee structures mentioned while answering the questions:
 - Collection committee
 - Collecting advisory group
 - Museum software advisory group
 - Policy and content advisory group
 - Software Exhibit Committee
 - Advisory group for staff directed project
 - Oral History model
 - Committee and staff plan and do together
 - Restoration Project
 - Museum sponsored, volunteer driven

Committee Models (Cont.)

- A proposed model should be a blend of these committee structures mentioned while answering the questions:
 - Software collecting projects
 - Museum sponsored, volunteer driven
 - “Task force” for addressing issues not solved elsewhere
 - Test bed for collecting
 - Test bed for archive
 - Test bed for community organizing
 - Software Collecting Community coordinator committee
 - Supports, sponsors and encourages collection projects (one of Len’s idea)

Three Major Activities

- Give three major area of focus (activities):
 - Activities can be grouped as:
 - Community, proactive collecting, Bootstrap the archive, Advise
 - Community (People)
 - Explicit as a goal (like Workshop) or implied
 - Broad collection of software by volunteers
 - Pro-active Collecting (Process)
 - What to collect and how
 - Collect!
 - Focus on 50's and 60's
 - Do the Software 100
 - Open software 1000 to outside

Three Major Activities (Cont.)

- Give three major area of focus (activities) (Cont.):
 - Bootstrap the Archive (Technology)
 - Help establish the collecting infrastructure (cooperative effort)
 - Mechanism for external contributions
 - Tests bed for software need
 - Advisory
 - Content advisors
 - Directed collection advisors

- Congruence with museum activities:
 - Staff priorities
 - Relative independence for activist volunteers
 - Resources needs
 - Resources available
- Are there different membership roles in case of a larger community

Suggestions for Re-focusing

Suggestions for Re-focusing

- Long Term Vision
- Three Areas of Activities
- What Unique about Software
- Examples of Intermediate Steps
- 10 Tasks
- Tasks Structure & Time Frame
- Next Steps

Long Term Vision

- Software Collecting Community modeled after Lens' and Dick Gabriel's ideas:
 - Makes the world better for software collecting with:
 - A distributed web community of interested active volunteers staffed by volunteers
 - Sponsoring collecting and preservation projects
 - Helping with web tools and advice
 - Scalable thanks to a low overhead model
 - For approval and
 - Storage in the archive
 - The museum would
 - Assure the long term viability of the efforts
 - Provide some resources and
 - Would dramatically benefit for its own collection
- This can only work if volunteers will see advance in joining over collecting independently

Three Areas of Activities

- A community of volunteers and interested parties
- Pro-active Collecting
- A software archive
- Comments:
 - The long term vision and areas of activities support well the original November 2004 statements
 - But the words are sharper and the consensus is stronger about these directions
 - There is a re-emphasis on pro-active collecting

What's Unique about Software

- Software collecting is taking place on a grand scale outside of the museum
- Unlike physical artifacts or exhibits there is little building space or money required
- Strong motivated volunteers exist because of their career connection to the product
- So why work with museum?
- We can lend:
 - Our image as a “sponsor”
 - Our long term viability
 - Our experience on tools and processes
- We must act quickly or software collecting will be done by other institutions

Examples of Intermediate Steps

- A community of volunteers and interested parties
 - Initial establishment and publicizing of the current community using a “plone” like environment
- Pro-active Collecting
 - 3 to 5 Collecting test cases completed:
 - Fortran, NLS, Multics, etc.
- A software archive
 - A test bed of the archive concepts to determine the requirements for a production system

10 Possible Tasks

1. Establish a web presence for SCC
 1. Use plone or equivalent software
 2. Create a set of white papers
2. Establish an initial virtual web community
 1. Manage discussion groups
3. Attract new passionate members
4. Organize a workshop or symposia
5. Refine the collection criteria
6. Post the Software 100+
7. Finish collecting test cases
8. Catalogue the collection
9. Test case the requirements for a community digital archive
 1. Using the current collecting test cases (Fortran, NLS, Multics)
10. Help in the museum archive production software selection

Task Structure & Time Frame

- Small task groups (3 to 4 people) with a leader
 - meeting frequently
 - reporting back to SCC
- Time frame
 - Monthly reporting
 - Deliverable in time increments of 4 to 6 weeks
- Find new passionate volunteers to staff unassigned projects
 - Increase numbers of projects
 - Bring new expertise

Next Steps

- Refine 10 tasks
- Select task leaders
- Define common staff/ volunteers tasks
- Improve clarity of responsibility
- Get management buy-in and resources
- Do it