TDL Bylaws (Revision May 2018)

Article I – Name

The name of the organization is the Texas Digital Library, hereinafter known as TDL. The Texas Digital Library is an association of institutions whose fiscal agency is the University of Texas at Austin Libraries.

Article II – Mission, Code of Ethics, and Goals

Section 1
The mission of the TDL is to advance and advocate the role of digital libraries and digital scholarly communication technologies that support the research and teaching missions of institutions of higher education in Texas and to promote cooperation, communication and resource sharing among its members. The TDL will seek to represent the interests of all member institutions in its decision-making.

Section 2
The Texas Digital Library is committed to maintaining high standards of ethics at all times.

Section 3
The goals for the Texas Digital Library is:

- to provide an open forum and adequate representation to all digital library professionals and organizations
- to be a resource for members in all stages of digital library development in support of scholarly communication
- to provide a set of services to TDL member organizations that support digital scholarly communication
- to identify targets of opportunity that can benefit members and establish effective means of communication to facilitate members’ focus on areas of interest
- to establish a collaborative atmosphere in which members can come together to help each other and ultimately improve the digital library community in Texas
- to serve both the membership and the digital library community through a variety of programs such as the Texas Conference on Digital Libraries (TCDL), the TDL training program, and presentations at international conferences
- to provide and cultivate leadership in the digital library community that effectively communicates issues, concerns, and developments for the improvement of scholarly communication
- to provide recognition of outstanding achievements in statewide digital library development in support of scholarly communication
Article III – Membership and Member Board

Section 1
Membership in the TDL shall be limited to nonprofit institutions of higher education. Three classes of membership are available: Regular Member, Affiliate Member, and Consortia Member.

Section 2
Regular member. The administrative head of the library of the institution will act as the representative to TDL. Each administrative head shall have one place on the Member Board with one vote. An administrative head may designate a person to represent him/her at meetings as a discussant and to vote on questions. This designation must be put in writing and presented to the chair of the meeting prior to the beginning of the meeting.

Section 3
Affiliate member. The administrative head of the library of the institution will act as the representative to TDL. Affiliate members can serve on committees but do not have a place on the Member Board, cannot vote, and cannot hold office.

Section 4
Consortia member. Multiple Regular members can be grouped into a Consortia membership, with approval of the Governing Board. The administrative head of the library of one of the institutions will act as the representative to TDL. This administrative head shall have the rights of a Regular Member. This administrative head may designate a person to represent him/her at meetings as a discussant and to vote on questions. This designation must be put in writing and presented to the Chair of the meeting prior to the beginning of the meeting.

Article IV – Officers

Section 1
The officers of the TDL shall be Chair, Vice-Chair/Chair Elect and Secretary/Treasurer.

Section 2
The Officers will serve as the Executive Committee. (See Article V, Section 5)

Section 3
The term of office is one year for Chair and Vice-Chair/Chair Elect. The term of office is two years for Secretary/Treasurer.

Section 4
The Chair shall be the presiding officer of the Governing Board and, with the aid of the Executive Committee, establish meeting agendas and represent the organization.
Section 5
In the absence or withdrawal of the Chair, the Vice-Chair/Chair Elect shall have and perform all duties and obligations of the Chair. The Vice-Chair/Chair Elect shall also perform other duties as may be assigned by the Chair or the Governing Board. The Vice-Chair shall exercise duties incident to the office including appointing committees and providing a program of work for each standing committee and such other duties as may seem appropriate.

Section 6
The Secretary/Treasurer shall keep minutes of the proceedings of the Governing Board and maintain a register giving the names and addresses of administrative heads entitled to vote. The Secretary/Treasurer shall also keep such other records as may be required, including all financial records. The Secretary/Treasurer will report on the state of the TDL’s financial resources at the fall meeting.

Article V – Governing Board and Executive Committee

Section 1
The Governing Board of the TDL shall consist of the Founding Association of Research Library (ARL) Members and at least three members elected at large from the other Regular Members. The Governing Board members will choose the Chair, Vice-Chair/Chair Elect, and Secretary/Treasurer at the fall meeting after the Member-at-Large position(s) have been filled.

Section 2
For every four non-Founding-ARL Regular Members added to the TDL membership, the Governing Board may increase its elected representation by one member.

Section 3
The TDL Director and a staff representative determined by the Director will serve as *ex officio*, non-voting members of the Governing Board.

Section 4
Five members of the Governing Board, including at least three Founding ARL members, shall constitute a quorum.

Section 5
The Executive Committee shall be appointed by the Governing Board and will consist of at least one Founding ARL member and at least one other Regular Member of the Governing Board.

Section 6
Those members appointed to the Executive Committee will serve for two years.

Section 7
The Executive Committee shall be responsible for recommending a proposed budget and dues schedule to the Governing Board. The Executive Committee shall set the agenda for meetings and carry out other necessary business as occasions may arise.
Section 8
Should the office of Vice Chair/Chair Elect, Secretary/Treasurer, or a Member-at-Large position become vacant, the Governing Board shall appoint a member to fill the office or position for the remainder of the regular term.

Article VI - Committees

Section 1
The Standing Committees include: Conference Committee, Nominations and Elections Committee (see Article VII), Awards Committee, and Legislative Committee. The Conference Committee shall be responsible for the annual Texas Conference on Digital Libraries (TCDL). The Awards Committee shall be responsible for acknowledging outstanding achievements in digital libraries in support of scholarly communication throughout the state of Texas. The Legislative Committee shall keep the TDL membership informed of legislation affecting all libraries serving institutions of higher education, work to establish beneficial relationships with the State Legislature and the Texas Higher Education Coordinating Board, and work in cooperation with the Texas Library Association.

Section 2
The Chair may appoint such special committees as are deemed necessary to perform such duties as may be assigned to them.

Section 3.1
With the exception of the Legislative Committee, committee member(s) shall be appointed by the Vice-Chair/Chair Elect for a period of two years.

Section 3.2
The Legislative Committee shall be appointed for a two-year term in even-numbered years by the Vice-Chair/Chair Elect. Individuals with needed expertise that are not TDL members may be appointed as committee members to serve without voting privilege, but the majority of the committee members must be members of the TDL.

Section 3.3
The diversity of the organization shall be reflected in the membership of each committee.

Section 4
Each committee chair will report in writing to the TDL membership. The report should contain the record of activities of the committee. Failure of a committee to complete the program of work provided by the Chair shall be sufficient cause for removal of the committee’s membership.

Article VII – Nominations and Elections

Section 1
In the spring, the Chair shall appoint a Nominating Committee of three members, one of whom shall be the exiting Chairman of the Governing Board.
Section 2
The Nominating Committee shall name at least one candidate for each Member-at-Large board position to be filled. At-large members will serve terms of three years, with one third of the at-large positions being elected each year. Such nominations shall reflect the diversity of the organization. Nominations may also be made from the floor.

Section 3
The Nominating Committee shall conduct the election prior to the Fall Meeting of the Member Board.

Article VIII – Meetings

Section 1
The TDL shall meet annually in the fall at a time and place to be determined by the Governing Board acting on behalf of the members. The Chair shall report to the membership on the Governing Board’s activities since the previous meeting. Interest groups within the TDL may schedule regular discussion groups to meet during the annual meeting.

Section 2
Other meetings may be called at the discretion of the membership or of the Governing Board. All related expenses will be the responsibility of the interest group calling the meeting.

Section 3
A majority of the Member Board, including at least three of the Founding ARL members, constitutes a quorum, and a majority of those present and voting shall decide the question.

Section 4
The rules contained in the latest edition of Robert’s Rules of Order Revised shall govern the TDL in all cases to which they are applicable, and in which they are not inconsistent with the Bylaws or any special rules of order established by the TDL.

Article IX – Funds, Contracts, and Property

Section 1
The TDL’s fiscal year shall be September 1 through August 31 of the following year.

Section 2
Funds for expenses of the TDL shall be derived from annual institutional membership fees paid by members and from additional funds that accrue from TDL activities, gifts, and other sources.

Section 3
An annual institutional membership fee will be assessed. The fees will be set by the Governing Board at the fall meeting, and will be due by the following August 1.
Section 4
In the event that the TDL ceases to exist, the financial assets, such as they may be, will inure to the benefit of the members.

Article X – Records
The Governing Board shall determine the repository for records of the TDL.

Article XI – Amendments
Section 1
Amendments to these Bylaws may be made only by an affirmative vote of a majority at a meeting of the Governing Board.

Section 2
Notice of the proposed amendments to the Bylaws will be given in writing at least thirty days in advance of the meeting.
TEXAS DIGITAL LIBRARY: VISION 2020

Mission

The Texas Digital Library is a consortium of Texas higher education institutions that builds capacity for preserving, managing, and providing access to unique digital collections of enduring value.

Our empowering technology infrastructure, services, and community programs:

- Support research, teaching, and digital curation efforts at our member institutions
- Facilitate collaboration amongst our community and with external partners
- Connect local work to a global ecosystem of digital library efforts

Vision

The Texas Digital Library will be an essential resource, built by and for our institutional members, that enhances access to the unique digital collections of members and ensures their long-term preservation.

Strategies

- Deliver essential preservation services as an integral component of a national digital preservation infrastructure, in order to preserve knowledge for future generations.
- Enhance the access, usability, and interoperability of members’ digital collections by fostering connections within the digital library ecosystem.
- Create meaningful and innovative professional development programs.
- Leverage the expertise of member librarians and staff, to take advantage of their talents, develop shared standards and practices, and establish a common base of knowledge across all member institutions.
- Establish a broad and enduring base of funding through membership, external partnerships and funding sources, and legislative appropriation.
<table>
<thead>
<tr>
<th>Institution</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angelo State University</td>
<td>Christopher Matz</td>
<td><a href="mailto:chris.matz@angelo.edu">chris.matz@angelo.edu</a></td>
</tr>
<tr>
<td>Baylor University</td>
<td>Jeffry Archer</td>
<td><a href="mailto:Jeffry_Archer@baylor.edu">Jeffry_Archer@baylor.edu</a></td>
</tr>
<tr>
<td>Houston Public Library</td>
<td>Saima Kadir</td>
<td><a href="mailto:Saima.Kadir@houstontx.gov">Saima.Kadir@houstontx.gov</a></td>
</tr>
<tr>
<td>Sam Houston State University</td>
<td>Eric Owen</td>
<td><a href="mailto:ericowen@shsu.edu">ericowen@shsu.edu</a></td>
</tr>
<tr>
<td>Stephen F. Austin State University</td>
<td>Jonathan Helmke</td>
<td><a href="mailto:helmkej@sfasu.edu">helmkej@sfasu.edu</a></td>
</tr>
<tr>
<td>Texas A&amp;M International University</td>
<td>Benjamin Rawlins</td>
<td><a href="mailto:benjamin.rawlins@tamiu.edu">benjamin.rawlins@tamiu.edu</a></td>
</tr>
<tr>
<td>Texas A&amp;M University *</td>
<td>David Carlson</td>
<td><a href="mailto:davidhcarlson@tamu.edu">davidhcarlson@tamu.edu</a></td>
</tr>
<tr>
<td>Texas A&amp;M University – Corpus Christi</td>
<td>Catherine Rudowsky</td>
<td><a href="mailto:catherine.rudowsky@tamucc.edu">catherine.rudowsky@tamucc.edu</a></td>
</tr>
<tr>
<td>Texas A&amp;M University at Galveston</td>
<td>David Baca</td>
<td><a href="mailto:bacad@tamug.edu">bacad@tamug.edu</a></td>
</tr>
<tr>
<td>Texas State University</td>
<td>Joan Heath</td>
<td><a href="mailto:jh06@txstate.edu">jh06@txstate.edu</a></td>
</tr>
<tr>
<td>Texas Tech University *</td>
<td>Earnstein Dukes</td>
<td><a href="mailto:earnstein.dukes@ttu.edu">earnstein.dukes@ttu.edu</a></td>
</tr>
<tr>
<td>Texas Woman's University</td>
<td>Suzanne Sellers</td>
<td><a href="mailto:ssellers1@twu.edu">ssellers1@twu.edu</a></td>
</tr>
<tr>
<td>Trinity University</td>
<td>Christopher Nolan</td>
<td><a href="mailto:cnolan@trinity.edu">cnolan@trinity.edu</a></td>
</tr>
<tr>
<td>University of Houston *</td>
<td>Marilyn Myers (interim)</td>
<td><a href="mailto:msmyers@uh.edu">msmyers@uh.edu</a></td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>University of Houston – Clear Lake</td>
<td>Vivienne McClendon</td>
<td><a href="mailto:mcclendonv@uhcl.edu">mcclendonv@uhcl.edu</a></td>
</tr>
<tr>
<td>University of North Texas</td>
<td>Diane Bruxvoort</td>
<td><a href="mailto:Diane.Bruxvoort@unt.edu">Diane.Bruxvoort@unt.edu</a></td>
</tr>
<tr>
<td>University of North Texas Health Science Center</td>
<td>Daniel Burgard</td>
<td><a href="mailto:Daniel.Burgard@unthsc.edu">Daniel.Burgard@unthsc.edu</a></td>
</tr>
<tr>
<td>University of Texas at Austin *</td>
<td>Lorraine Harricombe</td>
<td><a href="mailto:ljharic@austin.utexas.edu">ljharic@austin.utexas.edu</a></td>
</tr>
<tr>
<td>University of Texas at Dallas</td>
<td>Ellen Safley</td>
<td><a href="mailto:Ellen.Safley@utdallas.edu">Ellen.Safley@utdallas.edu</a></td>
</tr>
<tr>
<td>University of Texas Medical Branch</td>
<td>Pat Ciejka</td>
<td><a href="mailto:pciejka@utmb.edu">pciejka@utmb.edu</a></td>
</tr>
<tr>
<td>University of Texas Rio Grande Valley</td>
<td>Paul Sharpe</td>
<td><a href="mailto:paul.sharpe@utrgv.edu">paul.sharpe@utrgv.edu</a></td>
</tr>
<tr>
<td>University of Texas at San Antonio</td>
<td>Dean Hendrix</td>
<td><a href="mailto:dean.hendrix@utsa.edu">dean.hendrix@utsa.edu</a></td>
</tr>
<tr>
<td>University of Texas Southwestern Medical Center</td>
<td>Kelly Gonzalez</td>
<td><a href="mailto:kelly.gonzalez@utsouthwestern.edu">kelly.gonzalez@utsouthwestern.edu</a></td>
</tr>
<tr>
<td>West Texas A&amp;M University</td>
<td>Shawna Kennedy-Witthar</td>
<td><a href="mailto:switthar@wtamu.edu">switthar@wtamu.edu</a></td>
</tr>
</tbody>
</table>

**Governing Board Members**  
* founding TDL member
<table>
<thead>
<tr>
<th>TDL SERVICE</th>
<th>MEMBERS</th>
<th>USAGE STATS</th>
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<tr>
<td>DIGITAL PRESERVATION</td>
<td>8</td>
<td>~ 50 TB of data</td>
</tr>
<tr>
<td>Duracloud, Chronopolis, AWS</td>
<td></td>
<td></td>
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<tr>
<td>DIGITAL REPOSITORY HOSTING</td>
<td>18</td>
<td>21 hosted repositories</td>
</tr>
<tr>
<td>DSpace</td>
<td></td>
<td>6.5 TB of content</td>
</tr>
<tr>
<td>HOSTED ETD MANAGEMENT</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Vireo ETD Software</td>
<td></td>
<td></td>
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<tr>
<td>RESEARCH DATA MANAGEMENT</td>
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<td>491 Dataverses</td>
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<tr>
<td>Texas Data Repository</td>
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<td>1310 datasets</td>
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<tr>
<td>6.5 TB of content</td>
<td></td>
<td>44K+ files</td>
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<tr>
<td>ACADEMIC JOURNAL HOSTING</td>
<td>10</td>
<td>70+ journals</td>
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<tr>
<td>Open Journal Systems</td>
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<td>Journal count is in flux as we</td>
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<tr>
<td></td>
<td></td>
<td>upgrade to OJS 3.</td>
</tr>
<tr>
<td>DPLA AGGREGATION</td>
<td>1</td>
<td>*New affiliate member, Houston</td>
</tr>
<tr>
<td>TXHub</td>
<td></td>
<td>Public Library!</td>
</tr>
</tbody>
</table>

| TDL MEMBERSHIP                                  |         |                                 |
| 4                                              | ARL Founding Members |                     |
| 10                                             | High Research Institutions |                   |
| 7                                              | Master’s Colleges     |                     |
| 3                                              | Independent Medical Libraries |               |
| 1                                              | Public Libraries      |                     |

![Pie chart showing distribution of TDL membership types](chart_image.png)
Texas Digital Library provides opportunities for leadership and professional development through participation in member groups and committees. The members are listed below in alphabetical order by institution.

### 2020-2021 TDL MEMBER GROUPS

<table>
<thead>
<tr>
<th>Group</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>DSpace Training &amp; Education Group</td>
<td>Joseph Pruett (chair), Angelo State University</td>
</tr>
<tr>
<td></td>
<td>Susan Elkins, Sam Houston State University</td>
</tr>
<tr>
<td></td>
<td>Lea DeForest, Texas Digital Library</td>
</tr>
<tr>
<td></td>
<td>Laura Waugh, Texas State University</td>
</tr>
<tr>
<td></td>
<td>Adrian Shapiro, Texas Woman’s University</td>
</tr>
<tr>
<td></td>
<td>Jingshan Xiao, University of Houston-Clear Lake</td>
</tr>
<tr>
<td>DSpace User Group</td>
<td>Kristi Park, Texas Digital Library</td>
</tr>
<tr>
<td></td>
<td>Taylor Fairweather-Leitch (chair), West Texas A&amp;M University</td>
</tr>
<tr>
<td></td>
<td>Vice-chair TBD</td>
</tr>
<tr>
<td></td>
<td>NOTE: Over 80 people have signed up for TDL’s DSpace User Group email list. Approximately 15-20 members join the monthly DUG meetings on a regular basis.</td>
</tr>
<tr>
<td>OJS User Group</td>
<td>Denyse Rodgers, Baylor University</td>
</tr>
<tr>
<td></td>
<td>Susan Elkins, Sam Houston State University</td>
</tr>
<tr>
<td></td>
<td>Bruce Herbert, Texas A&amp;M University</td>
</tr>
<tr>
<td></td>
<td>Alexa Hight (chair &amp; founder), Texas A&amp;M University – Corpus Christi</td>
</tr>
<tr>
<td></td>
<td>Kristi Park, Texas Digital Library</td>
</tr>
<tr>
<td></td>
<td>Laura Waugh, Texas State University</td>
</tr>
<tr>
<td></td>
<td>Laura Heinz, Texas Tech University</td>
</tr>
<tr>
<td></td>
<td>Amanda Zerangue, Texas Woman's University</td>
</tr>
<tr>
<td></td>
<td>Taylor Davis-Van Atta, University of Houston</td>
</tr>
<tr>
<td></td>
<td>Justin White, University of Texas Rio Grande Valley</td>
</tr>
</tbody>
</table>
| TCDL 2021 Planning Committee | Shelley Barba (chair), Texas Tech University  
|                           | Jon Crossno, UT Southwestern Medical Center  
|                           | Taylor Davis-Van Atta, University of Houston  
|                           | Nathaniel Dede-Bamfo, Texas State University  
|                           | Lea DeForest, Texas Digital Library  
|                           | Chianta Dorsey, UT Southwestern Medical Center  
|                           | Taylor Fairweather-Leitch, West Texas A&M University  
|                           | Linsey Ford, University of Houston - Clear Lake  
|                           | Alexa Hight, Texas A&M University Corpus Christi  
|                           | Ramona Holmes, University of North Texas Health Science Center  
|                           | Emily Johnson, University of Texas at San Antonio  
|                           | Jerrell Jones, University of Houston  
|                           | Christina Kellum, University of North Texas  
|                           | Alexander Rodriguez, University of Texas at Dallas  
|                           | Adrian Shapiro, Texas Woman's University  
|                           | Alex Suarez, Texas Digital Library  
|                           | Thao Votang, University of Texas at Austin  
|                           | Rachel Winston, University of Texas at Austin  
|                           | Amanda Zerangue, Texas Woman's University  |

| Vireo Steering Committee | Billie Peterson-Lugo (co-chair), Baylor University  
|                         | Christopher Starcher, Texas Tech University  
|                         | Emily Wuchner (co-chair), University of Illinois  
|                         | Jon Crossno, University of Texas Southwestern Medical Center |
| TDL Awards Committee | Morgan Briles, Stephen F. Austin State University  
Esteban Cantu, University of Texas at San Antonio  
Elle Covington, University of Texas at Austin  
Lea DeForest, Texas Digital Library  
Alan Garcia, ATX Barrio Archive *  
Kim Gianfresco, Texas A&M University-Corpus Christi  
Lauren Goodley (chair), Texas State University  
Beth Headrick, Beth Headrick  
Cynthia Henry, Texas Tech University  
Deborah Omowale Jarmon, San Antonio African American Community Archive and Museum *  
Julie Judkins, University of North Texas  
Erin Owens, Sam Houston State University  
Jaimi Parker, University of North Texas *  
Denyse Rodgers, Baylor University  
Alex Suarez, Texas Digital Library  
Anne Washington, University of Houston *  
Jingshan Xiao, University of Houston-Clear Lake  
* 2020 Award Winner |

| TDL Imaging Group | Marcia McIntosh (co-founder), University of North Texas  
Shannon Willis (co-founder), University of North Texas  
Erin Mazzei (co-chair), Texas State University  

NOTE: Nearly 50 people have signed up for the Group email list.  
Approximately 5-10 members are actively engaged on a regular basis. |
| **Texas Data Repository Steering Committee** | Christina Chan-Park (chair), Baylor University  
Rogelio Hinojosa, Texas A&M International University  
Laura Sare, Texas A&M University  
Dave Baca, Texas A&M University at Galveston  
Courtney Mumma, Texas Digital Library  
Laura Waugh, Texas State University  
Matthew McEniry, Texas Tech University  
Adrian Shapiro, Texas Woman’s University  
Reid Boehm (vice-chair), University of Houston  
Hammad Khan, University of Texas at Arlington  
Jessica Trelogan, University of Texas at Austin |
| **GIS Interest Group** | Joshua Been, Baylor University  
Cynthia Henry, Texas Tech University  
Katie Pierce-Meyer, University of Texas at Austin  
Michael Shensky (founder and chair), University of Texas at Austin  
Alex Suarez, Texas Digital Library  
*NOTE: Nearly 50 people have signed up for the GISIG email list. Approximately 5-10 members are actively engaged on a regular basis.* |
| **OER Ambassadors** | Rusty Kimball, Texas A&M University  
Lisa Louis, Texas A&M University-Corpus Christi  
Lea DeForest, Texas Digital Library  
Laura Heinz, Texas Tech University  
Amanda Zerangue, Texas Woman’s University  
Ashley Morrison, University of Texas at Austin  
DeeAnn Ivie, University of Texas at San Antonio  
Taylor Fairweather-Leitch, West Texas A&M University |
MESSAGING AND OUTREACH DISCUSSION

TALKING POINTS | The Value of Texas Digital Library

Texas Digital Library is a regional membership consortium rooted in higher education and governed by our members.

Our members form a cross-institutional collaborative community of library, archives, and technology workers who seek to propel the Academy forward by protecting the scholarly and cultural record, and by radically broadening access to it.

Through the development and maintenance of shared systems, staff, and resources, we are an affordable source of essential library infrastructure and services.

- TDL hosts Institutional Repositories, Open Access academic journals, ETD publishing platforms, and a statewide research data repository, as well as digital preservation storage solutions for long-term safe-keeping of valuable and fragile digital materials.
- Our tiered membership fee structure accommodates institutions of varying sizes and budgets, and allows for consortial discounts.
- We seek consortial discounts and opportunities for our members on external services. TDL is a consortial member of the Open Textbook Network and DataCite (through which we provide discounted access to DOI minting).

We enable your library to serve as a platform for enhanced visibility and reputation for your institution’s scholarship and cultural heritage collections.

- TDL-hosted institutional repositories allow members to collect, showcase, and share the scholarly work of their faculty and student researchers, providing persistent and citable links; Open Access without a paywall; and flexible options for sharing.
- TDL’s DPLA Aggregation Service ensures that digital cultural heritage collections of TDL members are discoverable in the Digital Public Library of America.
- TDL’s Texas Data Repository service makes the library a valuable partner to Offices of Research and academic departments and research centers within the university by offering faculty and student researchers the ability to securely store their research data, obtain library support for data management, get DOIs for their datasets, and control access to stored data.
- Our journal hosting service allows the library to be a center for Open Access publishing services, providing faculty and student-led journal teams with a free service for starting and maintaining peer-reviewed online journals.
We give members a seat at the table through our engagement with national and global partnerships. The strong collective voice of the TDL consortium elevates the needs and interests of our members.

- TDL is a Platinum Member of the DSpace Program, the community-supported program at LYRASIS that governs development of the open source DSpace repository platform. Through this membership, TDL sits on the DSpace Leadership Committee and influences the strategic direction of the platform on behalf of our members and their needs.
- As a charter member of the Dataverse Global Community Consortium, TDL connects relevant member institutions using the Texas Data Repository service with the global open source community developing the Dataverse platform. Our Texas community of users submit feature requests that guide development of the platform, and our development resources contribute code to the platform that is beneficial not just for our users but for Dataverse users around the world.
- TDL is a recognized leader in the US digital preservation community, earning us the distinction of the NDSA Innovation Award in 2018 and chair of the 2020 NDSA DigiPres annual meeting. With our partners at UC San Diego’s Chronopolis and the IMLS, TDL is forging the path towards distributed digital preservation for private and sensitive data. Additionally, partnerships within the Digital Preservation Services Collaborative allow TDL and our members to influence the direction of international efforts in digital preservation support.

TDL prioritizes openness. Our services use open infrastructure and standards, we engage in transparent decision-making with our members and partners, and we enable open content whenever possible.

- All TDL hosted services rely on open source and/or community-supported infrastructure that uses open standards. This approach allows us the greatest flexibility and control over our systems and data, and allows for greater interoperability and portability of content and systems.
- The terms of TDL membership are clearly articulated and available publicly on the TDL website; and TDL shares board minutes and other board materials in the TDL institutional repository.
With TDL, your library is not alone. No individual institution, or single person within that institution, bears the burden of having to know everything. Instead, by pooling resources and expertise around technologies, library teams can expand their networks and their capacity to thrive and succeed.

- For each of our hosted services, we coordinate a corresponding user group that meets regularly online, and provides community support and peer-to-peer training for workers at our member institutions. See https://www.tdl.org/groups/ for a list of groups.
- Our Helpdesk is available to library staff and faculty having issues with TDL services, and we use it to identify areas where training may be beneficial.
- We host monthly online “forums,” frequent webinars, and other virtual events to foster community and provide useful information for members. See https://www.tdl.org/tdl-events/ for a listing of all upcoming TDL events.
- We host the annual Texas Conference on Digital Libraries to provide members with opportunities for presentation, networking, and professional education.

Our motivation differentiates us from commercial, profit-driven vendors. We are driven to help our member libraries remain essential partners of the scholarly, academic, and public service missions of their universities and to help them grow their reputations for research and teaching, and as stewards of rich and important collections of digital content.

We want others to join us in this work, because we know that we are strongest when we move forward together.

OUTREACH STRATEGIES AND ACTIVITIES

Conduct market research to guide new and improved member and service-level outreach efforts.

- Mine Member Census data to identify prospects for service upgrades, as well as potential vulnerabilities.
- Annually target high-priority institutions for recruitment and update institutional profiles to facilitate TDL staff and Board directives.
- Investigate opportunities and best methods for engaging HBCU prospective members, including through conference attendance and direct outreach.
- Assess and describe membership vulnerability and focus efforts on those members.
Focus on new membership recruitment campaigns informed by the completed Member Census.

- Refine outreach messaging content and strategy, including:
  - Use segmented email marketing to target recruitment prospects.
  - Embed explicit recruitment messaging in all TDL events and community activities.
  - Refresh recruitment materials, including recruitment presentation and membership packets.
  - Gather and share testimonials from members.
  - Call on Deans and Directors at member institutions to recruit library directors at prospective member institutions.
- Host free/low-barrier events inclusive of non-members to learn more about TDL membership (e.g. TDL Breakfast at TCDL).

Increase service usage among existing membership, with efforts focused on Digital Preservation Services, the Texas Data Repository, and Academic Journal Hosting.

- Refresh and create marketing collateral for each service, including customizable marketing templates for addition of institutional branding.
- Identify and promote a pathway to digital preservation for each hosted service (DSpace, Journal Hosting, Texas Data Repository).
- Leverage service-based user groups in outreach to other members through webinars, documentation projects, etc.
- Executive-level (TDL, member Deans and Directors) outreach to vulnerable and single-service members.

Empower TDL Boards and other member groups to participate in new member recruitment and service use expansion efforts.

- Develop talking points for board members that convey the value of TDL.
- Open up the annual Member Board meeting to all Deans and Directors attending TCAL
- Develop recruitment packet for board members to distribute.
- Leverage user groups and interest groups to engage non-members.
  - Where appropriate, open up participation in user groups to non-members while still maintaining the value of groups for existing members. (E.g. quarterly open meetings)
  - Increase perceived value of services by improving user group engagement.
  - Enlist user groups in the development of webinars and webinar series that engage non-member institutions and non-users.
  - Enlist user groups in identifying opportunities for Digital Preservation and Data Management training events that engage non-members.
DATA CARPENTRIES MEMBERSHIP PROPOSAL

Executive Summary

The Texas Data Repository Steering Committee has requested that TDL consider a one-year pilot membership in Data Carpentry as a means to increase literacy among TDL library staff in fundamental data skills needed to conduct research and prepare them as workshop leaders in these skills.

The Carpentries is a community-driven collective of instructors who teach foundational computational and data science skills to researchers.

The TDR SC Project Team believes the goals of Carpentries and the Texas Data Repository to be mutual.

- By training TDL member librarians in Carpentries principles, we will build greater capacity for ongoing, sustainable Carpentries instruction at institutions across Texas.
- By learning best practices for managing data in Carpentries workshops, researchers are better equipped to share data that is findable, accessible, interoperable, and reproducible (FAIR).

Estimated cost of a one-year Silver membership = $11,500 ($7,500 membership fee + $4,000 travel costs)

Resources:

- Link to full survey results and recommendations (62 members responded)
- Data Carpentry site: https://datacarpentry.org/
- Data Carpentry Membership guidelines: https://carpentries.org/membership/

Deliverables for a Silver membership* pilot:

- Workshops - Cap of 35 attendees each, 1.5 days
  - 4 Carpentries coordinated workshops hosted at Libraries across the state (note that Texas institutions’ self-organized workshops are unlimited)
○ 6 certified Carpentries instructors at TDL member institutions (Online only training for silver membership); applicants selected by TDR Project team, TDR members have priority
○ Instructor travel and accommodations are not covered by the membership fee and are the responsibility of the member. Cost may be offset if local certified instructors are available and/or by charging for attendance ($15-$50).

• A pilot report done by the Project Team leads articulating preliminary results and recommendations for next steps issued to the TDL due in time to review before second year membership
  ○ Instructor survey created by committee
  ○ Survey of stakeholders
  ○ Workshop participant survey conducted by the Carpentries
• TCDL Session in May 2021 taught by some or all of the 6 instructors
• A TDL staff representative seat on the Carpentries Member Council

*Note that Carpentries membership covers all Carpentries (Library, Data and Software), but the pilot is a TDR pilot focusing on the Data Carpentries. If this pilot is successful and TDL moves ahead, we might choose to open up training and workshops for one or more of the other offerings.

Cost information:

• Silver = $7,500/year
• Carpentries coordinated workshop instructor (non-local) travel and accommodation supplement to charging $50 per attendee and assuming 20 attendees per 4 coordinated workshops = ~$4000 (Max attendees 35, historically low fee for attendance $15)
• Any fees collected for attendance will contribute to the travel budget for the instructors.
• Host institution provides catering and workshop venue at their cost.

Highlights from the survey:

• 62 respondents from TDL institutions
• 17 indicated that they would be interested in both participating as a Certified Instructor and as a host for a coordinated Carpentries workshop
• Only 8 of the 62 respondents said they would not want to participate
• Top 2 funding recommendations from survey:
  ○ TDL provides full sponsorship of the membership; TDL can invest in the pilot with available resources allocated to membership benefit; TDL funds the first year of Carpentries membership, similarly to the Dataverse pilot, where second year membership required support for the member institutions. (This is TDL’s recommendation for the first year pilot)
  ○ TDL and Pilot Cohort Members Share in the cost of membership; TDL funds the pilot year membership, but recoups some costs by charging the train-the-trainer participants and/or the participants in the Carpentries-hosted workshops. Example: Each of the 6 instructors pays TDL $200 for the training, and workshop
attendees at the 4 workshops all pay $25. TDL recoups up to $4200. (This is TDL’s recommendation for going forward after the pilot, potentially with adjustments based on the pilot results)
TEXAS DIGITAL LIBRARY MEMBER CENSUS REPORT EXECUTIVE SUMMARY

The Member Census Project | In 2019 Texas Digital Library embarked on a Member Census, a year-long project to assess the status of TDL’s relationship with its members and learn more about its members’ needs and goals.

The Member Census Project had two parts:

- On-Site visits by TDL staff to nearly every Regular Member campus
- A comprehensive Member Survey distributed to the Member Board, with each campus providing a single response

This report discusses the findings of both parts of this Member Census. Taken together, they provide rich insight into members’ perceptions of the TDL and its services, their desires for service improvements, and new needs for digital services to support the research and teaching missions of their universities.

Emerging Themes and Key Takeaways | The following takeaways are supported both by the survey results and data gathered through in-person visits.

- Most TDL services receive high marks for value and quality, with two-thirds or more of users rating them good or very good in most cases. The exception is our Journal Hosting service, which received the lowest value and quality marks. This service needs improvement both in terms of the attention our technology staff give to it, and the support we provide around it.
- Top service improvement requests included: better DSpace usage statistics, accessibility improvements (particularly for DSpace), and better integration of services with digital preservation storage options.
- Top training needs expressed through the survey included training in the areas of Digital Preservation, Research Data Management, and Data Wrangling.
- In terms of service expansion, the most popular choices were: a discovery portal for aggregated cultural heritage collections, a digital exhibit service, and consortial discounts for the web archiving service Archive-It (though Archivematica hosting or discounts also came up several times in campus visit discussions).
- Faculty buy-in to services like the institutional repository and the TDR remains a significant challenge to members’ outreach efforts. This is evident in the survey results, but also in the frequency with which the idea of a Scholarly Communication Outreach group was raised in member visits. Additionally, many members requested outreach toolkits or editable templates for use in their local outreach.
- TCDL receives high marks from across the consortium, and is an event our members sincerely look forward to each year. Our annual conference is a trusted venue for developers to connect, for colleagues to network and build on collaborative projects, and for early career librarians to start building their CVs. Members shared that they would like to see more in-person, TDL-led events like TCDL.
The TDL Forum, introduced in 2011 has become a highly popular source of information about TDL activities, with 74% of respondents indicating they receive information about TDL through it (second only to email lists as a source of information).

**Takeaways from Campus Visits** | In addition to the above findings related to our service and outreach efforts, our campus visits gave us some harder-to-quantify insights into our members’ needs and their relationship with TDL:

I. **TDL outreach suffers when we have only one point of contact at a member institution.** Information related to TDL services is not being distributed equally among library users, nor are all users aware of training and other consultations available to them as part of their membership. Particularly at campuses on which we have a single primary point-of-contact, other library staff or administrators were unaware of service capabilities, member groups, and/or training available. That lack of awareness leaves users unnecessarily frustrated with TDL services, in some cases. Regular campus visits are invaluable in exposing us to more than our usual set of contacts and giving us a broader set of contact points.

II. **Engagement among members immediately increased after each site visit.** We noticed more e-newsletter subscriptions, more registrants for TCDL and other TDL events (such as webinars), more participants at monthly member forums, and more non-primary contacts reaching out with questions after we visited member campuses. This underscores the importance of site visits to the on-going health of TDL’s relationship with its members, and the effectiveness of its services. We plan to continue to enhance engagement from new staff members as well as staff who are newly aware of what TDL has to offer in the form of invitations to join member groups, nominations for TDL Awards, and connecting members who are good candidates for collaborations.

III. **TDL’s existing and potential value, and the role it plays at a member institution, vary depending on the member’s size and resources.**

For smaller institutions with fewer on-campus resources, TDL’s hosted offerings allow institutions to provide services that they would not be able to provide on their own. In many cases, there is a single FTE (or less) who manages these services locally, which puts additional pressure on TDL staff and the TDL user community to provide support to these campuses. For larger institutions with higher levels of staffing and on-campus resources, the hosted services TDL provides do not carry as much perceived value. For these institutions, TDL’s role as convener and potential collaborator on more exploratory, possibly grant-funded projects is of greater importance. This divergence of perceived value of TDL has always been present and was confirmed by these visits.
Good Practice Principles for Scholarly Communication Services
A Self-Assessment by Texas Digital Library

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WHAT’S NEXT

BACKGROUND

In spring 2019, the Confederation of Open Access Repositories (COAR) and the Scholarly Publishing and Academic Resources Coalition (SPARC) announced the development of seven good practice principles to ensure that scholarly communication services are transparent, open, and support the aims of scholarship. These principles were designed to be used by libraries to make decisions about the services with which they will contract and by service providers, like TDL, to improve their practices and governance.

You can learn more about the principles here: https://sparcopen.org/our-work/good-practice-principles-for-scholarly-communication-services/.
In keeping with its commitment to openness and transparency, TDL is using the principles outlined by SPARC and COAR to assess our own scholarly communications services that provide Open Access to scholarly content, as well as the platforms and policies relevant to them. Specifically, TDL staff have used this tool to assess the following scholcomm service offerings: digital repository hosting (DSpace), research data management (Texas Data Repository), electronic theses and dissertation management (Vireo), and academic journal hosting (OJS).

Additional considerations were given to our host organization, the University of Texas at Austin, and the ways in which TDL is bound by policies and rules of the University in some cases.

We asked our members to review our self-assessment, leave comments and questions, and make suggestions for each of the principles and services. Feedback was incorporated into the final version of the self-assessment.
ABOUT THE RUBRIC

As indicated above, the rubric uses seven good practice principles for scholarly communication services. Those principles and their descriptions are:

<table>
<thead>
<tr>
<th>Principle</th>
<th>Description of Principle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good Governance</td>
<td>The service has strategic governance that allows community input on the direction of the service and operational governance with community representation and decision making power.</td>
</tr>
<tr>
<td>Open Standards</td>
<td>The service uses open APIs to enable interoperability, and adheres to open standards. Ideally, the platform is based on open-source software, but in cases where it is not, user-owned content is managed according to well-established, international standards.</td>
</tr>
<tr>
<td>Fair Data Collection</td>
<td>Only data necessary for the service’s provision are collected from users and the type of the data collected and how they are used is clearly and publicly articulated.</td>
</tr>
<tr>
<td>Transparent Pricing and Contracts</td>
<td>The service’s contract conditions and pricing are transparent and equitable, with no non-disclosure agreements included.</td>
</tr>
<tr>
<td>Easy Migration</td>
<td>User-owned or generated content can be easily migrated to another platform or service upon termination of contract, without any additional fee from the service provider.</td>
</tr>
<tr>
<td>Succession Planning</td>
<td>If the service is a nonprofit, the organization’s bylaws state the conditions and terms governing how the organization may be transferred or wound down. If the service is provided by a for-profit entity, the contract/agreement should not be assignable to another entity without the client’s express permission.</td>
</tr>
<tr>
<td>Open Content</td>
<td>Content, metadata and usage data are immediately, openly and freely available in machine-readable format via open standards, and using licenses (like CC0 or similar) which facilitate reuse.</td>
</tr>
</tbody>
</table>
TDL assessed our scholcomm services for each of those principles by reviewing
1) Ways that TDL complies with each principle (TDL Self-Assessment)
2) Ways TDL does not comply with each principle (Room for Improvement)

Below is our self-assessment which you are invited to review and comment upon.

ASSESSMENT

GOOD GOVERNANCE

DESCRIPTION OF PRINCIPLE
The service has strategic governance that allows community input on the direction of the service and operational governance with community representation and decision making power.

TDL SELF-ASSESSMENT
The Texas Digital Library has multiple levels of governance that allow for community input and operational governance, both for the consortium overall and for each scholarly communication service.

At the consortium level, the TDL Governing Board is comprised of elected and ex officio members from within our members and partners, provides strategic guidance for the consortium. The Member Board, which consists of representatives of all Regular and Consortium members, elects representatives to the Governing Board for 3-year terms and has opportunities to provide input through regular Member Board meetings. Additionally, an Executive Committee comprised of the Governing Board’s officers provides guidance on day-to-day decision making. Boards and their roles are formalized in the TDL Bylaws.

These bodies, along with service-level user groups, listed below, allow for community input on the direction of services and products. TDL also uses feedback from users provided via the TDL Helpdesk to guide service development.

Digital Repository Hosting (DSpace): The DSpace User Group (DUG), governed by a charter, provides feedback on TDL’s digital repository hosting service. Feedback from the DUG is represented to the larger DSpace open source community through our executive director’s seat on the DSpace Leadership Group and through member representation in DSpace open source
communities (like the DSpace Community Advisory Team). Working Groups and task forces from within the user group provide direction on development of the repository hosting service.

**ETD Management** (Vireo): The Vireo Users Group (VUG), governed by bylaws and led by the VUG Steering Committee, provides feedback on future development of the Vireo platform. TDL coordinates development efforts through the Developers Group, a subgroup of the VUG, which also elicits code contributions from the broader ETD community.

**Academic Journal Hosting** (OJS): TDL recently added an OJS User Group (OUG) to its roster of member groups. The OUG works to share resources about library publishing policies and good practices by facilitating better communication between TDL staff and libraries using this service, and by identifying areas of work that could be undertaken by member-led working groups. Additionally, TDL is a member of the Public Knowledge Project (PKP), the home of the Open Journal System project. TDL's support helpdesk is also a mechanism for feedback about OJS from users.

**Research Data Management** (Texas Data Repository): The Texas Data Repository Steering Committee (TDRSC) consists of research data liaisons from each institutional dataverse and is governed by a charter. TDL staff and a representative of the TDRSC represent the needs of the community within the Global Dataverse Community Consortium.

**ROOM FOR IMPROVEMENT**

Though each of TDL’s user groups has at least an informal role in governing service implementation and future development, only the TDR Steering Committee and Vireo Users Group have established mechanisms for doing so. TDL should consider standardizing a “product owner” and other decision-making roles across all of its user groups, or develop advisory boards for each service with governing authority.

**OPEN STANDARDS**

**DESCRIPTION OF PRINCIPLE**

The service uses open APIs to enable interoperability, and adheres to open standards. Ideally, the platform is based on open-source software, but in cases where it is not, user-owned content is managed according to well-established, international standards.
TDL SELF-ASSESSMENT

All TDL services rely on open source software applications using open standards. Interoperability and API functionality differ from resource to resource.

TDL's digital repository service uses open source DSpace, which relies on standard protocols and best practices for access, ingest, and export, including the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH), SWORD, and OpenSearch. It also provides a RESTful API and uses the Dublin Core metadata standard. DSpace code is currently licensed under the BSD open source license, and its organizational home is LYRASIS.

TDL's electronic theses and dissertation service uses Vireo open source software. TDL is the organizational home of the Vireo open source community. Vireo does not have an open API, as it is designed as a workflow tool rather than an open repository, but interoperates with SWORD-enabled repositories, including DSpace. Vireo uses the Dublin Core metadata standard and is currently licensed under the BSD open source license.

TDL's open access journals service uses open source Open Journal Systems (OJS), published under the General Public License. The Public Knowledge Project (PKP) is the organizational home for OJS. OJS supports the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH), which provides machine access to published article metadata for the use of indexing systems. Additionally, it follows XML standards, particularly journal publishing standards such as the National Library of Medicine (NLM) Journal Publishing Tag Set, which have proven crucial to PKP’s efforts to provide open, structured access to published scholarly content.

TDL's Texas Data Repository uses open source Dataverse. The Dataverse software is licensed under the Apache License, Version 2.0, January 2004. The Dataverse community has supplied a SWORD API for depositing data using a standards-based approach; a Search API for searching dataverses, datasets, and files; a Data Access API for downloading and subsetting data; a Native API for performing most tasks that are possible in the GUI; and a Metrics API for query statistics about usage of a Dataverse installation. Dataverse also provides metadata for datasets in the social sciences using the Data Documentation Initiative (DDI) standard as well as other metadata standards and schemas such as Dublin Core, DataCite, Virtual Observatory for astronomy data, ISA-Tab for biomedical data, DCAT, RDF, and schema.org. Detailed below are what metadata schemas we support for Citation and Domain Specific Metadata in Dataverse:

1 http://www.apache.org/licenses/
Texas Digital Library | Good Practice Principles for Scholarly Communication Services

- Citation Metadata | compliant with DDI Lite, DDI 2.5 Codebook, DataCite 3.1, and Dublin Core’s DCMI Metadata Terms (see .tsv version). Language field uses ISO 639-1 controlled vocabulary.
- Geospatial Metadata | compliant with DDI Lite, DDI 2.5 Codebook, DataCite, and Dublin Core (see .tsv version). Country / Nation field uses ISO 3166-1 controlled vocabulary.
- Social Science & Humanities Metadata | compliant with DDI Lite, DDI 2.5 Codebook, and Dublin Core (see .tsv version).
- Astronomy and Astrophysics Metadata | These metadata elements can be mapped/exported to the International Virtual Observatory Alliance’s (IVOA) VOResource Schema format and is based on Virtual Observatory (VO) Discovery and Provenance Metadata (see .tsv version).
- Life Sciences Metadata | based on ISA-Tab Specification, along with controlled vocabulary from subsets of the OBI Ontology and the NCBI Taxonomy for Organisms (see .tsv version).

ROOM FOR IMPROVEMENT

TDL relies on Amazon Web Services (AWS) infrastructure for hosting applications and content storage. AWS is a commercial vendor that provides limited transparency into its operations.

While TDL relies on open source applications that use open standards, each application could be improved to enhance interoperability, and TDL could do more to take advantage of interoperability among the services it hosts (e.g. between hosted journals and the data repository) and between its hosted services and the wider networked ecosystem of scholarly repositories (see COAR Next Generation Repositories report²).

FAIR DATA COLLECTION

DESCRIPTION OF PRINCIPLE

Only data necessary for the service’s provision are collected from users and the type of the data collected and how they are used is clearly and publicly articulated.

² https://www.coarrepositories.org/activities/advocacy-leadership/working-group-next-generation-repositories/
TDL SELF-ASSESSMENT

Texas Digital Library collects user data for service provision, and does not sell any individual or aggregate user data.

In general, each TDL service provides usage information to service administrators, and in some cases provides aggregate usage data to the public (for example, aggregate download statistics). TDL services use cookies to maintain a user’s identity between web sessions, and additionally have enabled Google Analytics to monitor site usage, which deploys cookies.

TDL has developed policy documentation related to data use and privacy for two its services:

- The Texas Data Repository maintains a privacy policy that is publicly available in user documentation. New users must acknowledge the privacy policy when they register an account.
- Academic Journal Hosting (OJS): Additionally, Texas Digital Library posts some information about data privacy and use for its Academic Journal Hosting service in its wiki. New users are required to acknowledge a privacy policy upon registration of an account in any TDL-hosted journal, but privacy policy language is currently left to individual journal managers. Moreover, the home organization for the OJS application, PKP, has provided extensive documentation on making OJS journals GDPR compliant, but many requirements are left to individual journal managers and editors to implement.

TDL does not post information about data privacy and use for its Digital Repository Hosting (DSpace) and ETD Management (Vireo) services.

ROOM FOR IMPROVEMENT

TDL does not clearly and publicly articulate privacy policy for hosted services other than TDR and, to a limited extent, Academic Journal Hosting.

TDL should develop and post Data Privacy and Use policies for each of its hosted services and make them easily available in our wiki and also from the sites themselves. Additionally, TDL should develop standard Privacy Policy language and make it the default policy for each hosted academic journal upon deployment.

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3 https://texasdigitallibrary.atlassian.net/wiki/spaces/TDRUD/pages/289112065/Privacy+Policy
TRANSPARENT PRICING & CONTRACTS

DESCRIPTION OF PRINCIPLE
The service’s contract conditions and pricing are transparent and equitable, with no non-disclosure agreements included.

TDL SELF-ASSESSMENT
The terms of TDL membership are clearly articulated and available publicly on the TDL website. TDL uses standard interagency contracts that are governed by the rules of our home institution, the University of Texas at Austin, and that do not include non-disclosure agreements.

Any "special case" agreements are reviewed and approved by TDL’s governing board, and logged in board minutes that are publicly available in the TDL institutional repository. Special-case agreements might include consortial arrangements or any discounted memberships or services.

ROOM FOR IMPROVEMENT
A Boycott, Divestment, and Sanctions (BDS) condition in UT Austin's interagency contract (requiring certification that the contracting party does not/will not boycott Israel) violates TDL’s own non-discriminatory stance and limits our willingness to say that we execute equitable contracts.

EASY MIGRATION

DESCRIPTION OF PRINCIPLE
User-owned or generated content can be easily migrated to another platform or service upon termination of contract, without any additional fee from the service provider.

TDL SELF-ASSESSMENT
All of TDL's scholarly communications services use open standards that facilitate migration and, in some cases, open harvesting of user-generated content. TDL does not charge additional fees for migration off of its servers or platforms.
ROOM FOR IMPROVEMENT
TDL's services rely on the OAI-PMH protocol for harvesting. While this remains a robust standard, other preferred protocols (i.e. ResourceSync) have emerged that TDL may seek to implement.

SUCCESSION PLANNING

DESCRIPTION OF PRINCIPLE
If the service is a nonprofit, the organization’s bylaws state the conditions and terms governing how the organization may be transferred or wound down. If the service is provided by a for-profit entity, the contract/agreement should not be assignable to another entity without the client’s express permission.

TDL SELF-ASSESSMENT
The TDL Bylaws state that "In the event that the TDL ceases to exist, the financial assets, such as they may be, will inure to the benefit of the members." TDL maintains a reserve policy that stipulates the amount of a cash reserve to be maintained for emergencies, including wind-down of operations. The TDL Governing Board is responsible for determining the conditions for wind-down or transfer of TDL's services.

ROOM FOR IMPROVEMENT
Neither the TDL Bylaws nor the Reserve Policy specify the conditions for wind-down or transfer of the organization and its services. Development of policy that documents the export packages from each system and mandates the return of data to each member institution is not yet underway. Additionally, we will recommend that all TDL service documentation be moved to GitHub and/or to one of our member institutions’ archives.
OPEN CONTENT

DESCRIPTION OF PRINCIPLE

Content, metadata and usage data are immediately, openly and freely available in machine-readable format via open standards, and using licenses (like CC0 or similar) which facilitate reuse.

TDL SELF-ASSESSMENT

Content, metadata, and usage data can be made openly and freely available in TDL’s hosted repositories and journals, at the discretion of the institution or individual managing the service. Publicly available materials can be harvested in machine-readable format.

Application of licenses is facilitated by the repository and journal platforms, but left to the discretion of repository managers, depositors, or journal managers. CC0 is the default license for data published in the Texas Data Repository. TDL-hosted DSpace repositories require submitters to agree to a redistribution license that can be configured by institutional managers; the default license is not a Creative Commons license, but can be configured as such at the request of the member. TDL-hosted academic journals may select a default license from a set of Creative Commons licenses; this decision is made by the journal’s management and not TDL.

TDL does not apply the Open Content principle as described to Vireo, its ETD management service. While the ultimate intent of Vireo is to facilitate open publication of theses and dissertations, it is an administrative and workflow tool for submission, management, and publication of these materials, not a final repository. In other words, the endpoint for materials submitted to Vireo is at the discretion of the institution.

ROOM FOR IMPROVEMENT

TDL provides hosted platforms that facilitate content sharing in keeping with the spirit of the Open Content principle, but it allows local institutions to implement policies and practices that align with their values and the needs of the content and wishes of the depositors. Institutions may restrict access to content per their local policy.

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4 https://texasdigitallibrary.atlassian.net/wiki/spaces/TDRUD/pages/288063559/Licensing+and+Permissions
5 https://texasdigitallibrary.atlassian.net/wiki/spaces/DIGREP/pages/646938757/Licensing
While TDL will not require institutions to adopt permissive licensing policies, we could do more to encourage the use of standard licenses and rights statements (e.g. CC licenses, RightsStatements.org) that facilitate reuse of materials. These actions could include additional training to members on the use of these tools, development of Best Practices Guidelines, and technology development that makes them the default in TDL-hosted repositories.

WHAT’S NEXT

This document will be shared with Texas Digital Library’s Governing Board at in Spring of 2020, presented to our member board at our annual meeting in Fall 2020, and published in our repository and on our website. In the long term, TDL will continue working toward improving our efforts to be in full compliance with all of the recommended good practices. If you have any questions or suggestions please email TDL at info@tdl.org.