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A Place to Stand: Fulcrum and Lever Press

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A Place to Stand: Lever Press and the Fulcrum Platform

(For Oberlin Digital Scholarship meeting, June 9, 2016)

[slide 2]

Good evening. My name is Rebecca Welzenbach. I am an associate librarian at the University of Michigan Library, where I have worked in the Michigan Publishing division since 2009. Since fall 2014, I have also been involved in the planning and implementation of Lever Press. Some of you may already be familiar with Lever Press, but I'll say more about it in a minute. Today I've been asked to speak specifically about Fulcrum, a new publishing platform for long-form digital scholarship that is currently under development at Michigan Publishing. Lever Press will be the first external partner press to publish exclusively on the Fulcrum platform. Tonight I'll say a bit about what this means, and how we hope Fulcrum and Lever Press together can transform the landscape of options for digital scholars.

[slide 3]

Lever Press is a digital first, open access press collectively funded by the libraries of more than 40 liberal arts institutions--most of them from the Oberlin Group.

About a year and a half ago, a task force charged by the Oberlin Group with developing the Lever Press idea selected a joint proposal from Amherst College Press and Michigan Publishing to work in partnership to provide editorial and production services for Lever Press.

[slide 4]

The Press, which officially launched in December 2015, is guided by the mission and ethos of liberal arts colleges, committed to publishing under a business model that we're calling platinum open access--that is, open access to our publications without fees charged back to authors--and to supporting born-digital, long-form scholarship.

[slide 5]

What do we mean by being guided by the mission and ethos of liberal arts colleges? Well, of course there's no single answer to that question--everyone involved has a slightly different view--but after much research and discussion, we propose the following guiding principles:

- Show a deep commitment to interdisciplinarity
- Engage with major social issues
- Blur the lines between research and teaching

I'd be happy to discuss these framing values with any of you later, or over the course of this meeting, however, in my limited time tonight, I want to focus elsewhere--on the notion of supporting born digital long form scholarship.

[slide 6]

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[slide 7]

The name of Lever Press was inspired by the quote from Archimedes, that given a lever long enough and a place to stand, he could move the world. The formation of Lever Press was all about building our Lever: getting enough schools together, a long enough lever to wield enough power. Tonight, I'll be focusing on a different piece of the puzzle: the place to stand. Or, more accurately: not the place for Archimedes to stand, but the place on which the lever rests: the Fulcrum.

[slide 8]

You may know that there are a flurry of large digital publishing grants out there right now that have been funded by the Andrew W. Mellon foundation. The vision here was articulated by Don Waters in an interview published on the Mellon website. He said:

“While this scholarly infrastructure was built over centuries,” Waters says, “the cyber infrastructure is being built much more quickly. At the Mellon Foundation, we want to help accelerate the next stage of this dynamic change and make the digital environment a natural place to do scholarship.”

[slide 9]

In March 2015, University of Michigan Press received \$899,000 from the Andrew W. Mellon Foundation. The proposal was for a suite of activities to be conducted over a period of three years (April 1, 2015 to March 31, 2018) with the end deliverable being a publishing platform built on the Hydra/Fedora framework, to be made available open source reuse as well as in the form of a hosted for-fee solution.

While in the short term the primary application of the platform is to address the “companion website” problem (an increasing demand from authors for a way of presenting research data alongside their books), in the longer term it will also provide the infrastructure to enable long form presentations of digital scholarship to be published.

The scope of the grant particularly addresses the needs of scholarly authors who wish to link source materials to book-length interpretations of them in an integrated way. This is an emerging need in media-rich humanistic fields such as performing arts, cultural studies, and archaeology. Humanists today often end their research projects with large archives of digital data -- archival research, 3d models and data sets, film clips, etc.. Rather than forcing authors to strip away the richness of these materials at the point of formal publication to meet the constraints of a book or journal article format, Fulcrum facilitates rich integration of such digital objects with the narratives that reference them.

[slide 10]

Fulcrum:

- Proceeds from the position that in the 21st century, all scholarship is digital scholarship, and merits publication in its richest and most fully functional form.
- Enables scholarly presses to apply their imprimatur to media-rich, born-digital scholarship—that is, potentially, to every work they publish—in a way that is...
 - Scalable; one platform expands to contain every work; rather than multiple siloed sites
 - Compliant with best practices for web accessibility, scholarly publishing, and digital

- preservation, so editors and authors can focus on the research.
- Communicates markers of quality that are legible to tenure and promotion committees, reviewers, and readers in the academy
- Transforms the press environment, so that is “natural” and “safe” for *all* authors and publishers to participate in the production and publication of digital scholarship.

[slide 11]

I'll show you this timeline, which really reflects the work of my colleagues at Michigan Publishing, simply to demonstrate really where we are right now. The grant period will focus on five pilot projects with our partner presses at Indiana, Minnesota, Penn State, and Northwestern. The first four of these consist, essentially, of substantial supplemental materials: media, be they data sets, video, images, etc., that are intended to accompany the book.

The fifth pilot is the University of Michigan presses own book. It will be the final one we tackle in this initial phase, and it also represents the fullest implementation of what we want to achieve on this platform: a digital only monograph, integrated with a 3D model and supporting database. I'll say more about this shortly.

I want to draw your attention to this item on the far right: where Fulcrum becomes a platform available to client publishers.

[slide 12]

OK, so what does this really all mean? What *is* Fulcrum?

For me, it boils down to: Press in the front, Library in the back.

Library: Hydra/Fedora: open source, repository at the heart of it all, active community of library developers, overall U-M migration in this direction

Press: Branding, consistency of (infra)structure, synthesis of resources, roles (such as acquiring editor; production editor) that reflecting press needs and workflows

Across the board: attention to accessibility, persistent, citable URLs, ensuring that works are discoverable in desired channels, metrics to capture impact.

OA, digital-first scholarly publishing at the level of an institution, organization, or press--not an individual authoring platform. Rather, a way to consistently manage many works.

We express this through our three core values:

[Slide 13]

Fulcrum is/will be: Flexible, Durable, Discoverable

[Slides 14-16--follow along]

[slide 17]

For an example, let's turn to that University of Michigan pilot project I mentioned earlier. This will be the first work to be published *exclusively* on the Fulcrum platform--no print component.

Since 2009 the Gabii Project, an international archaeological initiative based at the University of Michigan, has been investigating the ancient Latin town of Gabii, which was both a neighbor of, and a rival to, Rome in the first millennium BC. The trajectory of Gabii's growth and decline provides a new perspective on the dynamics of settlement in central Italy. This publication focuses on the construction, inhabitation, and repurposing of a private home at Gabii, built in the mid-Republican period. The remains of the house provide new information on the architecture and organization of domestic space in this period, adding to a limited corpus of well-dated examples. Importantly, the house's micro-history sheds light on the tensions between private and public development at Gabii as the town grew and reorganized itself in the mid- to late-Republican period transition. Published in digital form as a website backed up by a detailed database, the publication provides a synthesis of the excavation results linked to the relevant spatial, descriptive, and quantitative data.

The Gabii Project is supported by generous grants from the University of Michigan, the Kelsey Museum of Archaeology, the National Endowment for the Humanities, FIAT-Chrysler, the National Geographic Society, the Loeb Classical Library Foundation, and several private donors.

Narrative, database, 3D model generated in Unity game engine.

I want to make a distinction here that we are not pushing for more people to generate 3D models in a game engine. Our goal is to ensure that, have you done so, that that can be presented in an integrated and stable way along with the full package of your work.

[slide 18]

So. What would Lever Press on Fulcrum look like? We don't know quite yet. But here is how I imagine it:

- An author proposes a manuscript or a project, which is reviewed and developed with the author by Lever editorial staff and ultimately evaluated and (hopefully!) approved by the Editorial board.
 - Lever Production staff will take the final components of the project--be they text, image, audio, video, data, or something else--and ingest all elements into the fulcrum platform. Note: Fulcrum is not an authoring platform; intended to be mediated by publisher
 - Fulcrum will fully power representation of Lever Press titles online--that is, it will serve as the marketing/discovery platform (i.e. the catalog), as well as the reading platform
 - Title will be pushed out into the world along with other Lever Press titles, in such a way that it can be captured systematically by library catalogs, aggregators, etc.
 - OA first/only with optional/possible POD versions, where appropriate. That means, we are not interested in sales as a primary measure of success. Instead, impact: authors will receive metrics on the use and reach of their work.
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Synopsis: Lever Press (leverpress.org) is a digital-first, platinum open-access publishing initiative collectively funded by liberal arts colleges and guided by the particular mission and ethos of these institutions. Lever Press will also be the first “client” of Fulcrum (fulcrum.org), a publishing platform currently under development at Michigan Publishing. Funded by the Andrew W. Mellon foundation and built on the Hydra/Fedora open source repository framework, Fulcrum will help publishers present the full richness of their authors' research outputs in a durable, discoverable, and flexible form. This talk will introduce the Fulcrum platform, addressing its three major emphases--durability, discoverability, and flexibility--and why these values should matter to the authors/creators of digital scholarship and the publishers with whom they work. We'll look at one case study--a pilot project from the University of Michigan Press focused on the archaeological investigation of a mid-Republican Roman home. Finally, we'll imagine how Fulcrum will work with initiatives like Lever Press and--I hope!--engage in an interesting discussion around what scholars want and need from a forward-looking press.

Outline:

1. Introduction
 - a. Who am I?
 - b. What is Lever Press?
 - c. What is Fulcrum?
2. Mellon support for digital scholarship/digital publishing
 - a. “While this scholarly infrastructure was built over centuries,” Waters says, “the cyber infrastructure is being built much more quickly. At the Mellon Foundation, we want to help accelerate the next stage of this dynamic change and **make the digital environment a natural place to do scholarship.**” (<https://mellon.org/resources/shared-experiences-blog/are-you-ready-revolution-scholarly-communications/>). In other words...
 - b. **Making digital scholarship safe for humanists.**
3. What's Fulcrum? How is it unique?
 - a. What problem is Fulcrum solving?
 - i. In the first instance: the “Author website problem”
 1. Separation of data/media from narrative
 2. Inconsistency/siloing/fragile infrastructure
 - ii. Going forward: making digital publications (esp. OA ones) visible (to readers, to libraries, to customers, etc.) in the same way that print resources are.
 - b. Press in the front, Library in the back.
 - i. Press: Branding, consistency of (infra)structure, synthesis of resources
 - ii. Library: Hydra/Fedora: open source, repository at the heart of it all, active community of library developers, overall U-M migration in this direction
 - c. *Want to be clear: it is not an authoring tool*
 - d. The three foci:
 - i. Durable
 1. Built on an open source university infrastructure dedicated to providing durable long-term stewardship for digital objects. Each

item (an image, a video or audio file, a visualization) receives a permanent digital identifier that allows it to be securely cited. Settings related to reuse are controlled by the creator.

- ii. Discoverable
 - 1. Through use of industry standards and relationships, ensures that digital scholarship is discoverable and that authors therefore receive metrics of impact and credit for their work, from download counts to altmetric scores. Integration into the information supply chain ensures that content published on Fulcrum appears in library catalogs and other important user access points, addressing the “discoverability challenge” that besets much born digital scholarship.
- iii. Flexible
 - 1. Can present rich media files as well as text and images, and is adding support for more complex visualizations such as interactive models built in Unity3D. Being a node in the vibrant open source Hydra development community focused on the needs of the academy, Fulcrum is continually developing new capabilities relevant to authors.

- 4. [Example: A Mid-Republican House from Gabii](#) (Rachel Opitz, Visiting Assistant Professor, University of Arkansas; Marcello Mogetta, Assistant Professor of Roman Art and Archaeology, University of Missouri; Nicola Terrenato is Esther B. Van Deman Collegiate Professor of Roman Studies, University of Michigan.)
 - a. Since 2009 the Gabii Project, an international archaeological initiative led by Nicola Terrenato and the University of Michigan, has been investigating the ancient Latin town of Gabii, which was both a neighbor of, and a rival to, Rome in the first millennium BC. The trajectory of Gabii, from an Iron Age settlement to a flourishing mid-Republican town to an Imperial agglomeration widely thought to be in decline, provides a new perspective on the dynamics of settlement in central Italy. This publication focuses on the construction, inhabitation, and repurposing of a private home at Gabii, built in the mid-Republican period. The remains of the house provide new information on the architecture and organization of domestic space in this period, adding to a limited corpus of well-dated examples. Importantly, the house's micro-history sheds light on the tensions between private and public development at Gabii as the town grew and reorganized itself in the mid- to late- Republican period transition. Published in digital form as a website backed up by a detailed database, the publication provides a synthesis of the excavation results linked to the relevant spatial, descriptive, and quantitative data.
- 5. What will Lever Press/Fulcrum partnership look like?
 - a. What kinds of works might we support?
 - b. *What do digital scholars need in a forward looking, author-friendly press?*