

APTrust Strategic Plan, 2021-2025

This revised strategic plan ([original](#)) was approved by the APTrust Governing Board on July 9, 2025. The [Vision, Mission, and Shared Values](#) were separated into a new policy in April 2024

1. Evolve APTrust Technical Infrastructure.

1.1 Increase reliability, durability, and availability of APTrust services.

Values Alignment

- Affordability and Sustainability
- Portability/Interoperability

Key Performance Indicators (KPIs)

- Average amount of time to deploy new releases to production
- Average amount of time to complete the ingest of a 100 GB object

Actions

- Re-architect Registry as cloud-native
- Re-architect Preservation Services as cloud-native
- Implement Infrastructure-as-Code

Progress

Year	X Deploy Time	X Ingest Time	Status
2021			
2022			
2023			
2024			
2025			

1.2 Increase DART sustainability and usability.

Values Alignment

- Collaboration
- Affordability and Sustainability
- Inclusiveness
- Portability/Interoperability
- Openness and Transparency
- Empowerment

KPIs

- Time between releases
- Number of releases
- Number of participants in DART user community
- Number of changes based on UX/UI and accessibility testing

Actions

- Rewrite in GO
- Form DART user community
- Conduct UX/UI and accessibility testing.

Progress

Year	Time between Releases	Dependencies	Releases	Changes	Status
2021					
2022					
2023					
2024					
2025					

1.3: Add alternative storage and compute providers.

Values Alignment

- Affordability and Sustainability
- Technical Diversity
- Portability/Interoperability
- Openness and Transparency

KPIs

- Number of compute providers in production
- Number of storage providers in production

Actions

- Adding Wasabi storage
- Adding Azure or Backblaze storage
- Tabletop exercise for moving parts of infrastructure stack to other services (e.g., Azure, Google Cloud, IBM, Oracle)

Progress

Year	Compute Providers	Storage Providers	Status
2021			
2022			
2023			
2024			
2025			

2. Improve Internal and External Communication.

2.1 Develop and implement a comprehensive strategy for accurate and sustainable documentation.

Values Alignment

- Affordability and Sustainability
- Openness and Transparency
- Accountability

KPIs

- Membership documentation satisfaction rate
- Number of questions on same topic [implies weak documentation]
- Number of documentation pages changed

Actions

- Membership survey to assess the current state of documentation, identifying confusion and gaps.
- Create an overall documentation strategy that defines the types, purposes, and audiences of documentation; as well as who is responsible for their creation and maintenance.
- Align current documentation with strategy and identify areas for improvement.
- Deduplicate and retire documentation as able, and work to improve areas where needed.

Progress

Year	Doc. Satisfaction Rate	Questions per Topic	Doc. Pages Updated	Status
2021				
2022				
2023				
2024				
2025				

2.2 Foster an engaged and collaborative membership through useful and productive groups.

Values Alignment

- Collaboration
- Openness and Transparency
- Advocacy
- Empowerment

KPIs

- Number of active participants from member organizations
- Percentage of on-time deliverables from working groups
- Number of times members help members

Actions

- Develop and implement a mechanism to identify what groups are needed and to assess the charges of existing groups.
- Recruit staff from members, apart from Advisory Committee representatives, to serve on groups.

Progress

Year	Active Participants	On-Time Deliverables %	Number of members helping members	Status
2021				
2022				
2023				
2024				
2025				

2.3 Create a communication strategy for effective internal communication and targeted external communication to position APTrust as a trusted leader in distributed digital preservation.

Values Alignment

- Inclusiveness
- Openness and Transparency
- Accountability
- Advocacy

KPIs

- Number of active Slack users
- Average number of Advisory Committee attendees
- Number of inquiries about joining APTrust
- Number of participants in externally-focused events

Actions

- Re-charge the Communication and Policy Working Group to focus on communication only.
- Draft a comprehensive communication strategy
- Test, Assess, and Iterate communication strategy

Progress

Year	Number of active Slack Users	Average Number of Advisory Committee attendees	Number of inquiries	Number of external participants	Status
2021					
2022					
2023					
2024					
2025					

3. Increase Return on Investment for Members.

3.1 Create a resource to assist organizations in determining their digital preservation strategies.

Values Alignment

- Collaboration
- Inclusiveness
- Portability/Interoperability
- Empowerment

KPIs

- Number of guide downloads
- Number of buddies or organizational pairs
- Number of organizations who attribute digital preservation program success to APTrust

Actions

- Engage APTrust members on how they determined a digital preservation strategy. Identify common themes and successful tactics.
- Write a guide that generalizes an approach to building a digital preservation strategy and walks an organization through the steps.
- Create a buddy or mentoring system that pairs organizations with a mature digital preservation program with organizations still forming their digital preservation program.

Progress

Year	Number of downloads	Number of buddy/mentor pairs	Number of organizations assisted	Status
2021				
2022				
2023				
2024				
2025				

3.2 Increase the number of Associate Members by 50%.

Values Alignment

- Collaboration
- Inclusiveness
- Stewardship Continuity

KPIs

- Number of Associate Members
- Number of Sustaining Members actively pursuing Associate Members

Actions

- Create an Associate Member toolkit
- Incorporate Associate Members on the APTrust website
- Write up a success story on the APTrust news blog

Progress

Year	Number of Associates	Number of Sustaining seeking Associates	Status
2021			
2022			
2023			
2024			
2025			

3.3 Establish an APTrust research agenda.

Values Alignment

- Collaboration
- Advocacy

KPIs

- Number of APTrust research activities
- Number of scholarly communications created by APTrust or its members related to the research agenda

Actions

- Inventory past research activities.
- Identify the types of research projects and outputs that are suitable.
- Articulate a research agenda that outlines areas of research that APTrust and its members collectively pursue.

Progress

Year	Number of Research Activities	Number of Research Outputs	Status
2021			
2022			
2023			
2024			
2025			