

# Academic Preservation Trust Strategic Plan 2026-2028: Building Reliability and Trust for Sustainable Growth

See the [online dashboard](#) for this strategic plan's implementation.

## Timeline

3-year plan starting January 2026

## Executive Summary

The Academic Preservation Trust (APTrust) has demonstrated solid and reliable stewardship of scholarly and digital cultural content for over a decade, currently preserving more than 650 terabytes of unique data. Guided by an engaged advisory committee, a governing board, and a strong, member-driven community, APTrust embodies collaboration, openness, and inclusiveness in its shared mission to safeguard our collective digital heritage.

Looking ahead to 2026-2028, APTrust is committed to enhancing the usability and security of its services by improving search and reporting capabilities and expanding support for sensitive content deposits. Together with transparent and responsible financial management focused on long-term sustainability, this strategic plan positions APTrust to continue building a trusted network that preserves invaluable academic and cultural content for the future.

## History of Academic Preservation Trust

Founded in 2012 by a coalition of leading universities, the Academic Preservation Trust was created to collaboratively preserve the scholarly record in trusted digital form, ensuring lasting access and sustained funding for this vital mission. Over the years, the consortium has grown into a robust, member-driven community, achieving significant milestones, including maintaining a rapidly expanding preservation repository capable of ingesting over 1.5 terabytes of new content per day. Today, APTrust continues to exemplify the power of collaboration and shared responsibility in safeguarding academic and research content for future generations.

# Mission

The Academic Preservation Trust preserves and secures diverse digital scholarly and cultural content for member institutions, enabling sustainable management and long-term access through collaborative and trusted, community-built infrastructure.

# Vision

The Academic Preservation Trust envisions a future where our expert stewardship preserves petabytes of scholarly and digital cultural content, forming a trusted network of cultural and heritage materials that safeguards collective memory and supports knowledge creation for society.

# Values

APTrust is a member of the Digital Preservation Services Collaborative, which published a [declaration of shared values](#) in 2023. APTrust affirms its commitment to these values and seeks to demonstrate that commitment in the following ways:

## Collaboration

- We collaborate within the organization. APTrust members collaborate through interest groups, working groups, and committees.
- We collaborate with other organizations that share these values. APTrust is a member of the Digital Preservation Coalition and the National Digital Stewardship Alliance, and APTrust members regularly collaborate with other practitioners around the globe to further digital preservation.
- We share the products of our work freely. APTrust staff and members create open-source solutions that are of immediate use to the community to facilitate digital preservation for any size or type of organization. We also share our documentation and work products freely as part of our commitment to transparency.

## Affordability and Sustainability

- While APTrust members pay an annual membership fee, APTrust sustaining members can add associate members for other cultural heritage organizations with which they collaborate without the associate members paying their own membership fees. This lowers the barrier to using APTrust digital preservation services for smaller organizations.
- We also take advantage of partnerships and technologies to minimize costs.

## Inclusiveness

- While our official name is Academic Preservation Trust, we welcome any cultural heritage organization into our membership.
- APTrust members choose which collections they preserve, with the only limitation relating to the security of private information.
- We provide access to enterprise-level preservation services to organizations of any size through our associate membership model.

## Technological Diversity

- We use open technologies and commodity cloud services to build and provision digital preservation systems in multiple geographic regions.
- We adopt open standards wherever possible to promote the interoperability of its tools and systems.
- We develop open-source tools such as DART, the Digital Archivist's Resource Tool, to package and transfer content, and we make these tools available for others.

## Portability/Interoperability

- We use object storage industry standards to transfer digital content and verify its integrity with independent fixity checks.
- We develop infrastructure that is designed to work with any cloud provider. We strive to create tools that fit the general digital preservation use case, not just for our systems.

## Openness and Transparency

- We favor the use of open technologies and protocols, and we contribute to standards development for digital preservation.
- We hold regular member meetings that are open to the community and share our goals, progress, and financial details on our website and other places.
- We make our technical documentation, governance and policy documents, and budget reports publicly available.

## Accountability

- We have conducted a self-audit of ISO 16363 and maintain an open wiki of documentation and policies that demonstrate conformance.
- We publish all our preservation practices for any community member to examine and challenge.

## Stewardship Continuity

- As a membership organization, we have built a robust operational reserve. We strive to have enough operational reserves on hand to allow members to make alternate arrangements for their collections in the event of APTrust's dissolution.

- We care about the collections we preserve and have engaged in contingency planning for ongoing stewardship of member content if a member cannot continue paying membership or storage fees.

## Advocacy

- Through our interest groups, our members learn advocacy techniques from each other.
- We participate in digital preservation research projects to advance sustainable strategies for distributed digital preservation.

## Empowerment

- Our community of members is our most significant strength. Members regularly learn from each other in various ways, from operational strategies for digital preservation to advocacy strategies for getting through bureaucracy.
- The regular linear growth in deposited collections demonstrates that by working together, we can do more.

# Goals and Objectives

## Goal 1

Enhance APTTrust's technology infrastructure and tools to significantly improve the member experience, data access, and operational efficiency, aligned with our mission.

- **Objective 1.1:** Enable members to efficiently discover, access, and understand their preserved content through modern search and reporting capabilities that support diverse institutional workflows.
- **Objective 1.2:** Establish automated, reliable infrastructure operations that reduce manual intervention, accelerate service delivery, and improve overall system performance.
- **Objective 1.3:** Implement transparent service management practices that clearly communicate operational status, maintenance activities, and support pathways to members.

## Goal 2

Enable APTTrust members to customize and optimize the storage and location of their preserved content to better align with their individual risk-mitigation strategies and to enhance data management flexibility.

- **Objective 2.1:** Provide members with flexible control over where and how their content is stored, enabling dynamic optimization of their preservation strategies without service disruption.

- **Objective 2.2:** Diversify APTrust's storage infrastructure to reduce single-vendor dependency and enhance organizational resilience.

## Goal 3

Strengthen APTrust's comprehensive security and resilience capabilities to enable the collaborative, accountable, and empowered acceptance and management of sensitive digital content deposits, while enhancing preparedness through disaster planning, response, and risk management.

- **Objective 3.1:** Strengthen APTrust's security posture to better support sensitive academic content through assessment against and progress toward industry standards for research data management.
- **Objective 3.2:** Build organizational resilience through comprehensive risk management and disaster preparedness frameworks that protect member content and ensure service continuity.
- **Objective 3.3:** Streamline and secure member and staff access through modern identity management approaches that balance usability with institutional security requirements.

## Goal 4

Ensure the long-term financial viability and sustainability of APTrust through transparent, accountable, and inclusive fiduciary management that balances diverse revenue streams, strengthens member engagement, and safeguards reserve funding to support the mission.

- **Objective 4.1:** Demonstrate transparent stewardship by maintaining publicly accessible governance documentation, financial planning tools, and contingency frameworks that build member confidence.
- **Objective 4.2:** Diversify APTrust's revenue model and membership base to reduce dependency on any single funding source and expand the preservation community.
- **Objective 4.3:** Advance organizational accountability by providing clear visibility into the financial and environmental costs of digital preservation services.

## Goal 5

Strengthen APTrust's leadership in the digital preservation community through strategic knowledge sharing, collaborative advocacy, and expanded support for preservation readiness initiatives.

- **Objective 5.1:** Share APTrust's cloud preservation expertise with the broader digital preservation community through sustained engagement initiatives that address critical operational challenges in cloud-based preservation infrastructure.
- **Objective 5.2:** Build collaborative capacity for preservation advocacy by partnering with adjacent digital preservation organizations to develop actionable resources and unified community messaging.

- **Objective 5.3:** Enhance digital preservation readiness across the academic community through strategic partnerships that lower barriers to preservation adoption and strengthen institutional capabilities.

## Version History

Version	Status	Date	Notes
0.5	Draft	December 2025	Drafted by the Executive Director after community surveys, member meeting sessions, and Board consultation.
0.75	Draft	March 2026	Approved by Advisory Committee with light editorial changes.
1.0	Final	April 2026	Approved by the Governing Board.

# Appendix: 2026-2028 Implementation Priorities

This appendix outlines key implementation activities that support the strategic objectives detailed in this plan. Specific timing, dependencies, and technical specifications are detailed in APTTrust's annual technical roadmaps.

## Goal 1: Enhance Technology Infrastructure and Member Experience

### Objective 1.1 (Discovery and Access)

- Implement advanced search capabilities, including wildcard and partial matching
- Develop key canned reports and customizable report-building tools
- Explore the integration of a SaaS reporting platform with a replicated database

### Objective 1.2 (Operational Reliability)

- Complete migration from GitHub to GitLab
- Establish CI/CD pipelines and automated testing
- Integrate service desk support into the development environment

### Objective 1.3 (Service Management)

- Develop and implement a comprehensive Service Management Plan
- Define operational activities, schedules, and responsibilities
- Establish alerting and escalation procedures

## Goal 2: Enable Storage Customization and Flexibility

### Objective 2.1 (Storage Control)

- Develop capabilities for content movement between storage classes and locations
- Enable in-place migration without removal and re-deposit requirements

### Objective 2.2 (Storage Diversity)

- Implement custom combinations of storage classes and locations
- Expand storage provider options beyond AWS

## Goal 3: Strengthen Security and Resilience

### Objective 3.1 (Security Standards)

- Assess the feasibility of ISO 27001 certification
- Begin meeting key security requirements identified in the assessment

### Objective 3.2 (Risk Management)

- Review and update the disaster planning framework
- Finalize risk management documentation

### Objective 3.3 (Identity & Access Management)

- Explore centralized or federated identity and access management systems
- Implement the selected solution for member and staff access

## Goal 4: Ensure Financial Sustainability

### Objective 4.1 (Transparent Governance)

- Create and publish a sunset playbook for orderly organizational shutdown
- Develop an interactive cost calculator for the APTrust website

### Objective 4.2 (Revenue Diversification)

- Pilot consortial membership category
- Explore integration with adjacent services (e.g., Archive-It)

### Objective 4.3 (Environmental Accountability)

- Identify methods to communicate the environmental impact of preservation services
- Implement reporting at aggregate and potential unit levels

## Goal 5: Strengthen Community Leadership and Engagement

### Objective 5.1 (Cloud Expertise Sharing)

- Establish and facilitate, or identify and contribute to, a community practice group focused on cloud preservation operations
- Build on the iPRES 2025 workshop success to sustain community dialogue on cloud navigation

## Objective 5.2 (Collaborative Advocacy)

- Form a joint working group with adjacent digital preservation organizations
- Co-develop an actionable preservation advocacy toolkit for institutional use
- Coordinate advocacy messaging and resource sharing across partner organizations

## Objective 5.3 (Preservation Readiness)

- Partner with the Digital Preservation Services Collaborative on curriculum development
- Contribute to the creation of a comprehensive digital preservation readiness curriculum
- Provide financial and expertise support to expand access to readiness resources