

Annual Report 2024

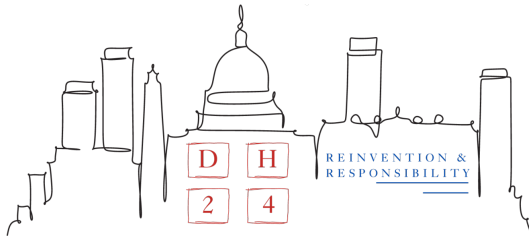


DIGITAL
SCHOLAR

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From the COO



We at Digital Scholar were excited to celebrate our 15th anniversary in 2024. The company has come a long way since its founding in 2009, with a small board and a checking account at a local Northern Virginia bank.

Over the course of the last 15 years, Digital Scholar has worked hard to be a reliable and innovative provider of essential elements of the digital scholarship infrastructure. I am grateful to be working with the more than two dozen individuals who sustain and maintain our projects. One cannot help but recognize the success of those efforts as one stands back to assess the place of the organization’s open source software in the research, publishing, and public engagement efforts of scholars, activists, and enthusiasts all over the world.

The project dispatches that follow in this annual report also point to the fact that each project team is focused on serving users’ needs and adapting to the changing landscape of our work by providing new features and new services. User feedback is vital to this work because these improvements depend on the teams keeping their fingers on the pulse of the many communities that they serve.

While Digital Scholar is dedicated to the ongoing development of its software, the organization is also focused on supporting and en-

gaging with the digital humanities community as a whole. In doing so, we were happy to be the anchor sponsor of DH2024, to invest in the work of The Programming Historian, and to take the first steps to revitalize and relaunch Digital Humanities Now. Each of these efforts marks our commitment to sustaining a vital community of practice that can ensure that the field continues to have access to open source infrastructure, open access resources, and spaces for open dialogue about our work.

We are very much looking forward to our next 15 years of work, serving the needs of our users, supporting the sustainability of open source software and open access resources, and collaborating with you.

Best regards,
Sharon

Governance

Mission

Digital Scholar is dedicated to launching, supporting, and sustaining critical open-source infrastructure for the digital humanities through responsible stewardship and ethical business practices. In doing so, DS is devoted to defending the right of the public to freely obtain, develop, and distribute free and open source software, and to supporting FOSS projects as they pursue sustainability.

Our Values

We are committed to developing and sustaining free and open source software that provides an infrastructure for scholarly research and digital cultural heritage work.

We are committed to working in a respectful and collaborative way among our project staff and with the community of users and developers who engage with our software.

We are committed to providing responsibly-priced services that meet user community needs and contribute to the sustainability of the software projects.

We are committed to working in productive collaboration with other FOSS projects to pursue sustainability.

Leadership

Sean Takats

President and Director

Sharon Leon

*Vice President and
Chief Operating Officer (Ex Officio)*

Tom Scheinfeldt

Secretary/Treasurer and Director

Dan Cohen

Director

Project Updates

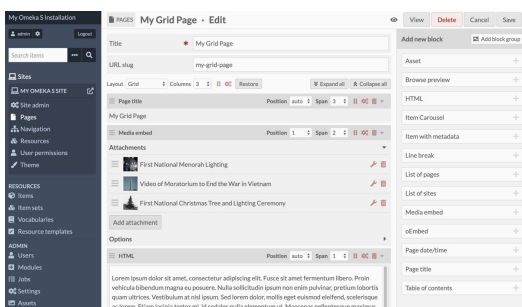
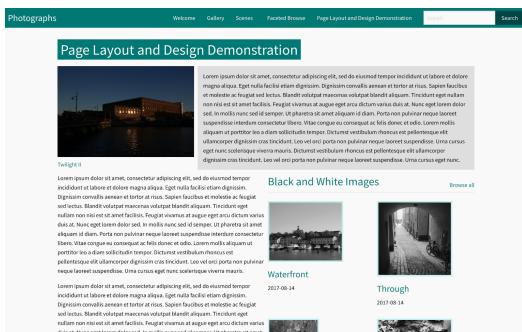


Omeka

The Omeka Team had an eventful year in their ongoing efforts to support librarians, archivists, curators, scholars and members of the public in sharing their digital collections with the world. The work of 2024 resulted in new releases of both core software platforms, a number of new and updated extensions, and themes.

A major release of the Omeka S platform transformed the page authoring interface for designing and creating public pages. Now users can use a block and grid system to customize their page layouts, and designers can specifically style every element on a page. These changes joined similar types of improvements to the public resource pages, vastly improving the flexibility of site creation in the platform. The team released five new modules, including ones

Customizable page layouts

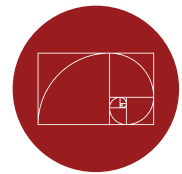


that allow users to copy resources, to annotate images, to create and publish resource hierarchies, and to work with Oral History Metadata Synchronizer objects as items. Additionally, there was a major v2.0 release of the Mapping module that added mapping by group, as well as polygon and polyline support. Finally, the team released a bright new theme: Lively.

The team also moved forward with Omeka Classic and Omeka.net's multi-year accessibility overhaul. This painstaking work assures that Omeka Classic, and by implication Omeka.net, fully meet contemporary accessibility standards. Along the way the design team has made numerous improvements and releases to the available themes.

All the while, the Omeka Services group has increased their offerings. As always, the Services group spent the year supporting users through direct planning assistance, responding to support requests, conducting custom training sessions, and offering intensive training courses. The group began to offer a sustainability package. Designed to offer peace of mind to project creators (and their funders), the package guarantees a specific term of hosting for a live Omeka installation, and the production of a number of preservation grade assets so that digital projects can be retired and preserved.

In 2025, the team is eager to continue their efforts to more fully meet the needs of archivists and oral historians, as well as to support users with collections management requirements. Each of these groups makes up a core constituency for the Omeka project and we are striving to respond to their feature requests.



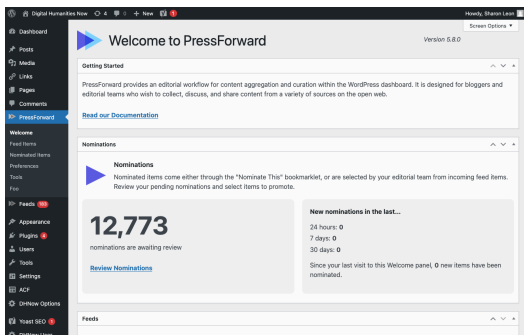
[Omeka.org](https://omeka.org)
Project Staff: 10

Omeka.net
Users: 118,531
Sites: 68,416

Omeka Classic
Version: 3.1.2
Plugins: 118
Themes: 14

Omeka S
Version: 4.1.1
Modules: 150
Themes: 11

PressForward



The new Welcome panel

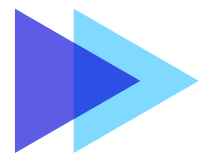
During 2024, there were three major releases of the PressForward plugin for WordPress. The system is now optimized to integrate more fully with the native functions provided by the latest versions of WordPress. These new releases included improved integration with WordPress's block editor system, as well as a number of under-the-covers redesigns to improve feed importing performance. Second, the software now includes a Welcome panel that provides an easy-to-use path into PressForward content for both new and existing users. We have added the ability to add a comment when nominating an item; a feature that allows admins to customize the format the Source statement appended to incoming items; and configurable email notifications when an item you have nominated or commented on receives a new editorial comment.

Recent updates also have included overhauls of a number of long-standing features. The Feed management panel now includes the Block Editor, fields for editing a feed URL, and tools for manually triggering retrieval. The Add Feed tools now include improved validation for URLs,

duplicate detection, and better auto-detection of feed URLs based on site URLs. The PressForward Dashboard has a new menu structure. Feeds are now handled in a separate top-level menu item, while All Content is renamed to Feed Items and Nominated is renamed to Nominated Items. We have added support for feed authors, which are pulled from the feed, are editable by the admin, and are used as a fallback value for feed item authors when a given feed item has no specific author data.

Finally, the most recent release of the software includes a new opt-in feature that submits a source URL to the Internet Archive (archive.org) when an item is promoted to draft. We view this feature as contributing to efforts to preserve content that editors view as significant.

All of these improvements are part of an effort to streamline and improve the performance of the plugin, but the project is also grappling with the changing information and social media landscape. The moment of dominance for RSS feeds as a form of syndication has long since passed, and the PressForward team and the advisory board are looking forward to using 2025 to envision the process of content aggregation, curation, and publication. In doing so, we are exploring the creation of a stand-alone application, and a number of new publication formats external to the WordPress platform.



[PressForward.org](https://pressforward.org)
Project Staff: 3
Active Installs: 300+
Version: 5.8.0

Sourcery

In 2024 the Sourcery development team accomplished three major tasks. First, it finished the work started in 2023 to provide organizational users (i.e. archives and archivists) with specialized tools for fielding and tracking researcher requests. These new tools included the ability to add and manage multiple staff accounts under a single organization and an updated dashboard for tracking requests, file uploads, and researchers, including search and filtering functions and customizable views. Second, the development team laid the groundwork for the relaunch of Sourcery's peer-to-peer document fulfillment service, including building out the database architecture, location services, payments infrastructure, Request from Sourcery bookmarklet, and user interfaces necessary to support third-party Sourcerer request fulfillment across the United States and Canada. Third, the team upgraded Sourcery's underlying technology infrastructure to support new features, enforce security best practices, and improve performance. This work included patching contributed libraries, improving sign-in security,

implementing one-time passcodes, and rewriting large portions of the codebase. In addition to this work on the main web application, the development team made upgrades to the Sourcery Android application and began work on the Sourcery iOS application, which will launch in 2025.

Meanwhile, in preparation for the relaunch of the peer-to-peer service, Sourcery's outreach activity in 2024 began to shift its focus from organizational users to researchers. An important aspect of this work involved tabling at major conferences, including American Society for Environmental Historians (April), the National Council on Public History (April), the Society for Historians of the Early American Republic (July), the American Association of State and Local History (September), the Oral History Association (November), and the American Studies Association (November). The outreach team also conducted several virtual workshops with historians and other researchers, for example with the history departments at Wayne State University History Department and the University of Notre Dame. Late in the year, the outreach team piloted a print advertising program, running ads in the American Association for State and Local History's Weekly Dispatch and in Publications of the Modern Language Association (PMLA). Additional ads are scheduled to run in the American Historical Association's Perspectives magazine and in American Heritage.

Finally, in Fall 2024, the Sourcery team prepared and submitted a \$750,000 grant proposal to The Andrew W. Mellon Foundation. This grant was awarded in December and will support the relaunch of the peer-to-peer service in April 2025 and the increased outreach and user support activities it will entail.



SourceryApp.org

Project Staff: 5

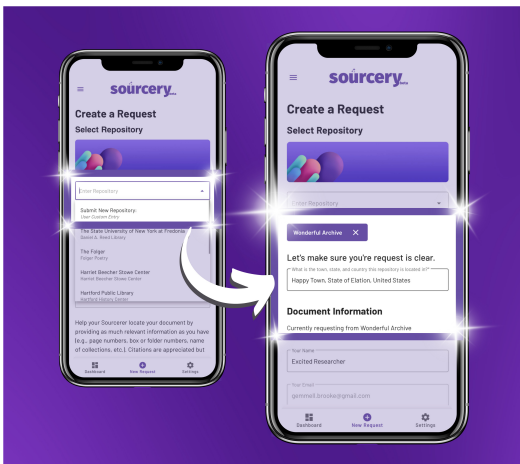
Version: 1.0.20

Institutional

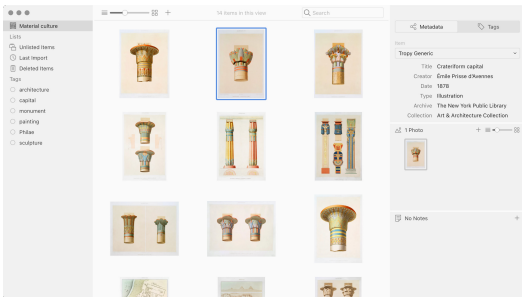
Partners: University of Connecticut, Northeastern University, Hartford Public Library
Registered (confirmed) users: 1166

Current external funding: the Mellon Foundation, \$750,000

Document request workflow



Tropy



Tropy's project view

In 2024, the Tropy team focused on improving its research photo management software to better serve the needs of scholars, archivists, and cultural heritage professionals. This year's work included key software updates and targeted outreach efforts to expand reach and impact.

On the development side, Tropy released two major updates (v1.16.0 and v1.16.1), one minor update (v1.16.2), and five beta releases. These updates introduced practical improvements, such as automatic filename suggestions for exporting photos, better text direction handling in notes, and usability fixes for navigation and file management. Additionally, the platform was upgraded to Electron 28, ensuring improved security and compatibility with modern systems.

In direct outreach activities, Tropy engaged over 1,000 participants across 18 events, balancing virtual, hybrid, and in-person formats. The year prioritized high-impact in-person engagements at international conferences, such as the EUROPAST Public History Summer School in Luxembourg, DH2024 at George Mason University, and events in Brazil. These engagements

allowed the team to connect with a broad audience of students, researchers, and GLAM professionals.

The introduction of the Train the Trainer model provided a new avenue for expanding Tropy's reach by equipping educators and institutional staff to teach its methodologies within their networks. Notable sessions included workshops at Yale University and the School of Fine Arts at Federal University of Minas Gerais (Brazil). Continuing its commitment to user support, the Tropy team assisted the community throughout the year via individual requests and active engagement on the forums. The team explored Tropy's application in teaching digital source criticism at DH2024, demonstrating its potential as a tool for undergraduate classrooms. This specific research forms the basis of a publication proposed to the [Journal of Digital History](#).

As Tropy looks to 2025, efforts will focus on launching new functionality to enable computational accessibility, implementing experimental workshops to explore applications of natural language processing (NLP) and large language models (LLMs), and continuing to refine Tropy's offerings in response to user feedback. These priorities reflect Tropy's commitment to delivering robust, reliable tools that meet the evolving needs of its growing community and that take advantage of new technologies.



[Tropy.org](#)

Project Staff: 4

Downloads: 251,831

Version: 1.16.2

Plugins: 7

Current external funding: the Mellon Foundation, \$500,000, through December 2024

Zotero

In 2024, Zotero increased its users, improved accessibility, and began development of new functionality powered by generative AI. Our user base grew to 14.4 million (25% increase over 2023), who have collectively uploaded 6 billion items (25% increase) and are currently collaborating in over 4.6 million groups (9.5% increase). Our mobile apps continued their growth: on iOS we had over 962,000 downloads worldwide; on Android we increased our public beta cap to 15,000 users.

Driving this growth was Zotero's launch of its most comprehensive overhaul of its core software since its 2006 launch. Zotero 7 users for the first time now work in native interfaces redesigned from scratch by a dedicated design staff. This new UI isn't merely aesthetically pleasing; it offers plugin developers new opportunities to expand Zotero's user experience and

enables new reading and annotation functionality. In addition to PDFs, Zotero now supports native reading and annotation of EPUBs and web snapshots; desktop users can now also draw on their PDFs like they have been able to do in Zotero's mobile applications.

The Zotero team worked with an external quality assurance firm over an eight-month period to evaluate Zotero's accessibility and to address problems. A single Zotero developer served as point-of-contact, testing all accessibility and coordinating fixes with the rest of the team. This intensive work with an independent firm ensures that Zotero is now fully functional for users with disabilities who work with screen readers or who require full keyboard access. Thanks to this evaluation process, Zotero now has a testing and remediation pipeline that enables the team to respond quickly to reports of accessibility issues. Zotero also has a fully passing VPAT report to share with institutions considering adopting Zotero.

Over the past year we saw a proliferation of "AI and Zotero" tools; to date most of these initiatives have taken the form of plugins or external services developed by third parties, and which draw on remote or local LLMs, often with variable quality and dubious scholarly value. Recognizing a need to offer trustworthy services in this space, we launched a new partnership with Northeastern University's Institute for Experimental AI. Our first effort is aimed at developing a support agent to assist Zotero users. We expect that the partnership – to continue through 2025 – will enable the Zotero team to build expertise in creating and updating custom models as well as benchmarking them and performing risk assessment.



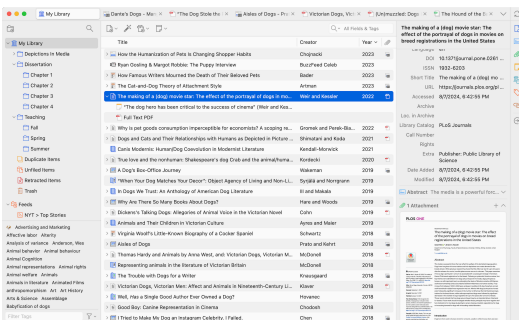
[Zotero.org](https://www.zotero.org)

Project Staff: 13

Users: 14.4 million

Version: 7.0.11

Zotero's redesigned interface



Financial Status



Financial Status 2024

Digital Scholar closed out the 2024 fiscal year in excellent financial standing. Total sales continued a five-year trend of growth averaging 30% year over year. In order to comply with the terms of service associated with Zotero storage and Omeka hosting subscriptions, DS aims to retain earnings at a rate of at least 50% of its ongoing total subscription revenue.

As sales have increased, so have our costs, though not nearly at the rate of the sales growth. Given the continued annual growth in the use of our services, our cost of goods sold, which is composed primarily of server infrastructure costs and project personnel, increased by 26% in 2024. This increase is consistent with our previous performance, where our costs have trailed sales growth with an average increase of 23% year over year during the past five years.

Strong uptake of our services in recent years made it possible for DS to support a robust team of designers, developers, and end-user focused staff across all projects. Currently our headcount of full time equivalent employees is 29.

DS continues to work diligently to constrain business expenses. Our average overhead rate is only 14%, despite new legal, accounting, and insurance expenses associated with a growing and successful operation. We experienced an increase in accounting compliance expenses during 2024 that accompanied new tax collection and filing obligations. Although operating as a nonprofit following its articles of incorporation, DS enjoys no tax-exempt status and must pay federal and state taxes. In 2024, DS paid just over \$475,000 in income tax.

Finally, during 2024, DS made just over \$200,000 in charitable contributions.



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