

Midwest Collaborative for Library Services (MCLS)

National Leadership Grants for Libraries (NLG-L): “Demonstrating and Documenting a Statewide LOCKSS 2.0 Preservation Network for Cultural Memory Institutions”

Statement of National Need: The Midwest Collaborative for Library Services (MCLS) requests \$248,000 for a two-year implementation grant (National Digital Infrastructures and Initiatives) to support a nascent statewide digital preservation service focused on reducing barriers to participation by leveraging emerging technology (LOCKSS 2.0) and offering learning opportunities to help develop a community of digital preservation practice at cultural memory institutions throughout Michigan. Focusing on both technical process and community-building strategies, the project will be documented and presented in an implementation guide to be shared with a national audience.

In 2019, the IMLS-sponsored “Statewide & Regional Stepping Stones to the National Digital Platform Grant” galvanized a community willing to support digital preservation in Michigan and developed materials to sustain those efforts including model agreements, policy templates, and a collaboration toolkit. A key finding of this work is that smaller institutions reported challenges to participating, due to limited technical expertise and economic need. To help continue and further energize building wide access to digital preservation, The Midwest Collaborative for Library Services (MCLS), Western Michigan University (WMU), Michigan State University (MSU), Grand Valley State University (GVSU), and the Library of Michigan (LM) signed a Memorandum of Understanding creating the Michigan Digital Preservation Network (MDPN; <https://www.mipres.org/>) with the goal of having a financially-sustainable model for cultural memory institutions to participate, based on their financial and technical capacity. Over the past fourteen months, the MDPN has investigated and evaluated different technical tools and strategies (including co-leading a statewide LOCKSS 2.0-alpha pilot with WMU), developed a governance structure and tiered-cost membership plan, and built a network of engaged partners at museums, archives, libraries, and historical societies across all regions of the state. Continuing to build from that work, the aims of this project are to deploy a scalable LOCKSS 2.0 preservation network as a model for other startup networks, and to provide learning and training opportunities on digital preservation practice to collections managers, archivists, librarians, IT professionals, and others at cultural memory institutions, in Michigan and nationally.

New technology (including Exactly and DART) designed to make depositing content easier, and preservation network systems like LOCKSS 2.0 have improved interfaces to simplify management and lower barriers to adoption, especially for smaller and under-resourced institutions. Taken together, these tools could allow smaller institutions to take on a more involved and empowered role with preservation, helping them preserve collections they might not be able to otherwise. However, documentation for the new LOCKSS 2.0 is not fully developed, making broad adoption and implementation of the new software a challenge, especially for institutions without technical expertise. Building off of lessons learned from the Stepping Stones project and from our LOCKSS 2.0-alpha pilot, this project will address a national need for roadmaps centered on replicating similar community-based preservation networks using low-cost management tools, including LOCKSS 2.0. As an organization that already serves libraries across two states, MCLS (the MDPN’s organizational home and fiscal agent) is also uniquely positioned to scale this project’s goals even further by fostering interstate dialogue toward a midwestern preservation network as a means to share resources and expertise. The midwest is well-suited for such an exploration, given successful digital stewardship initiatives in Indiana (InDiPres), Minnesota (through the Minitex consortium), Wisconsin (Recollection Wisconsin), and Ohio (through the OhioLINK consortium). The Alabama Digital Preservation Network welcomes members from across the southeast, and suggests a successful model for such a regional network. Overall, this project seeks to learn and build from the work of other successful statewide and regional digital initiatives, promulgate lessons learned to a national audience, and provide new resources for building a broadly inclusive and collaborative preservation network that can be adopted and adapted by other states and regions.

Project Design

Project goals and outcomes will include:

- Deploy a geographically-distributed LOCKSS 2.0 full production network with at least five nodes managed by partners from diverse types of institutions.
- Investigate, document, and disseminate documentation and workflows focused on ease of adoption using emerging technology, such as LOCKSS 2.0 and DART.
- Provide access to digital preservation services to cultural memory institutions with a range of technical skill levels, resources, and digital materials.
- Convene workshops, symposia, and meetings to share project findings and to explore the creation of a cooperative and broadly inclusive midwest preservation network for all cultural memory organizations.

The deployment of a statewide network involves working with a range of partners (including many involved with our LOCKSS 2.0-alpha pilot) to host network nodes or update existing nodes to the latest LOCKSS version, and to test and refine workflows and documentation alongside LOCKSS developers. This part of the project will employ technical specialists from MDPN member institutions to help with technology deployment and testing, and with documenting and communicating successful strategies. Concurrent with the testing and documentation aspect of the project, the MDPN Coordinator will continue ongoing engagement with a wide variety of current partners at institutions, associations, consortia, and collectives across Michigan (including LM, the Michigan DPLA Service Hub, Michigan's archival and museum associations, and state historical society). Working in alignment with Stepping Stones' goals and vision, i.e., prioritizing preservation services for cultural institutions with limited technical skills and resources, who maintain collections that are at risk due to factors such as pending insolvency, limited technology support, insufficient intellectual control, or environmental risks including natural disasters, is key to the Network's success. Thorough and accessible documentation, along with a one-on-one orientation call with the MDPN Coordinator, onboarding materials, and on-demand training workshops and videos will provide a gradual and smooth on-ramp to the Network for new members, while MDPN technical experts and the member-led community of practice will help with real-time assistance and questions.

We will share lessons learned throughout the project with a national and international audience via community calls with the Private LOCKSS Networks (PLN) group, MetaArchive, National Digital Stewardship Alliance (NDSA) interest groups, and others, and at conference and meeting presentations (e.g., the Digital Library Federation Forum/NDSA DigiPres, the iPres conference, Bitcurator Forum, and the American Alliance of Museums and American Association for State and Local History annual meetings). MDPN is already an active member in many of these organizations and is well-suited to disseminate project findings to a broad audience. The project would also build off of the MDPN's successful first-annual Member Summit (which featured national speakers) by presenting a national symposium focused on sharing and engaging with project results, including an implementation guide, case studies from a diverse cross section of network users, and technical documentation related to the LOCKSS 2.0 network.

National Impact: This project meets four goals of the NLG-L. By offering an implementation guide toward building a scalable, community-centered digital preservation network, the project will provide a template for building workforce and institutional capacity for managing the national information infrastructure, as described in Goal 1. We will also meet this goal through collaborating with LOCKSS to build documentation to help guide other existent and emerging LOCKSS-based networks. In continuing to actualize the Stepping Stones project's findings, alongside lessons gleaned from our LOCKSS 2.0-alpha pilot, with the aim of sharing a model for a community-based LOCKSS preservation network among collaborative partners at libraries, museums, and archives across any state or region, this project also addresses Goals 3, 4, and 5 of the NLG-L. Building documentation and best practices for a digital preservation network based on broad inclusivity, low technical barriers, and financial and technical resource sharing that eliminates duplicative efforts among members will offer other states and regions a roadmap to preserve digital collections for the purpose of long-term public access and use, in a resilient manner that will protect important cultural memory content from the risk of natural disaster, cyber threats, and human error. By demonstrating how a collaborative, LOCKSS 2.0-based digital preservation network provides a safe, reliable, and approachable on-ramp for cultural memory institutions of all sizes and capacities to bring digital content under preservation, this project ultimately seeks to enable museums, libraries, archives, and others to continue using collections to inspire civic engagement and promote understanding through storytelling and dialogue for decades to come. Sharing project findings broadly to a national audience via conference presentations and MDPN-hosted symposia will provide a template to help similar organizations and new preservation networks collaborate with partners to protect at-risk digital content and build capacity in their communities.

Using the Stepping Stones project's collaboration toolkit in partnership with the documentation and deliverables promised with this proposal, this project will provide an expanded implementation guide that covers everything from how foster collaboration to how to implement a state or regional level LOCKSS 2.0 preservation network and how to build a community of practice.

Estimated Budget: The project requests \$248,000: \$90,000 for LOCKSS 2.0 hardware; \$100,000 for technical and administrative support related to implementing and documenting the LOCKSS network implementation; \$10,000 for Wasabi cloud storage backup for content deposited in LOCKSS for up to one year; \$18,200 toward hosting workshops and conferences; \$5,000 for travel costs; and \$24,800 in 10% de minimis indirect costs to MCLS.