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Protecting Future Access Now Models for Preserving Locally Created Content

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Amigos Online Conference

Digital Preservation: What's Now, What's Next

August 12, 2011



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ITHAKA is a not-for-profit organization that helps the academic community use digital technologies to preserve the scholarly record and to advance research and teaching in sustainable ways.

We pursue this mission by providing innovative services that aid in the adoption of these technologies and that create lasting impact.



Ithaka S+R is a research and consulting service that focuses on the transformation of scholarship and teaching in an online environment, with the goal of identifying the critical issues facing our community and acting as a catalyst for change.



JSTOR is a research platform that enables discovery, access, and preservation of scholarly content.



PORTICO

Portico is a digital preservation service for e-journals, e-books, and other scholarly e-content.



PORTICO

Over 2,000 societies, and associations have committed content to Portico through 132 publishers agreements.

»	E-journal titles	12,204
»	E-book titles	107,117
»	D-collections	45



ANYONE CAN BE A PUBLISHER...

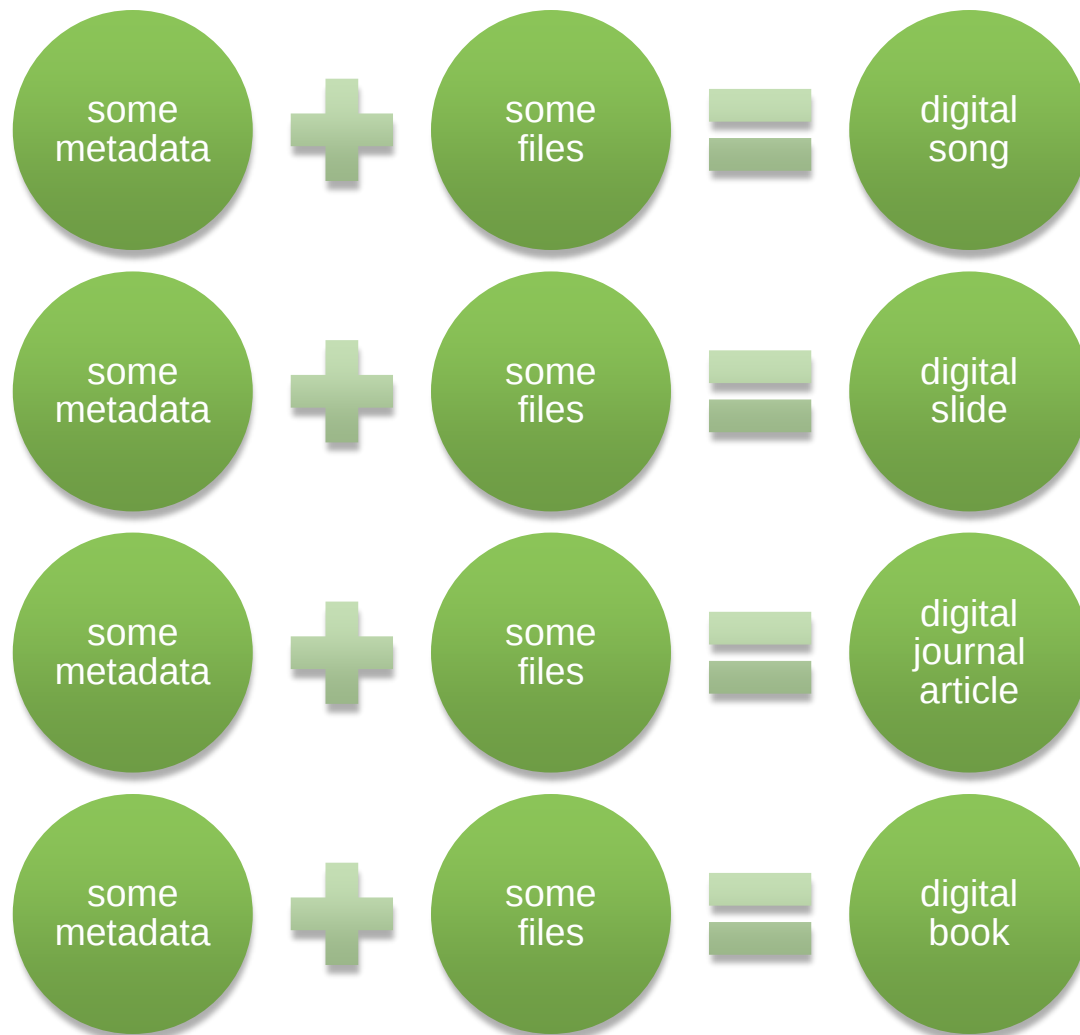


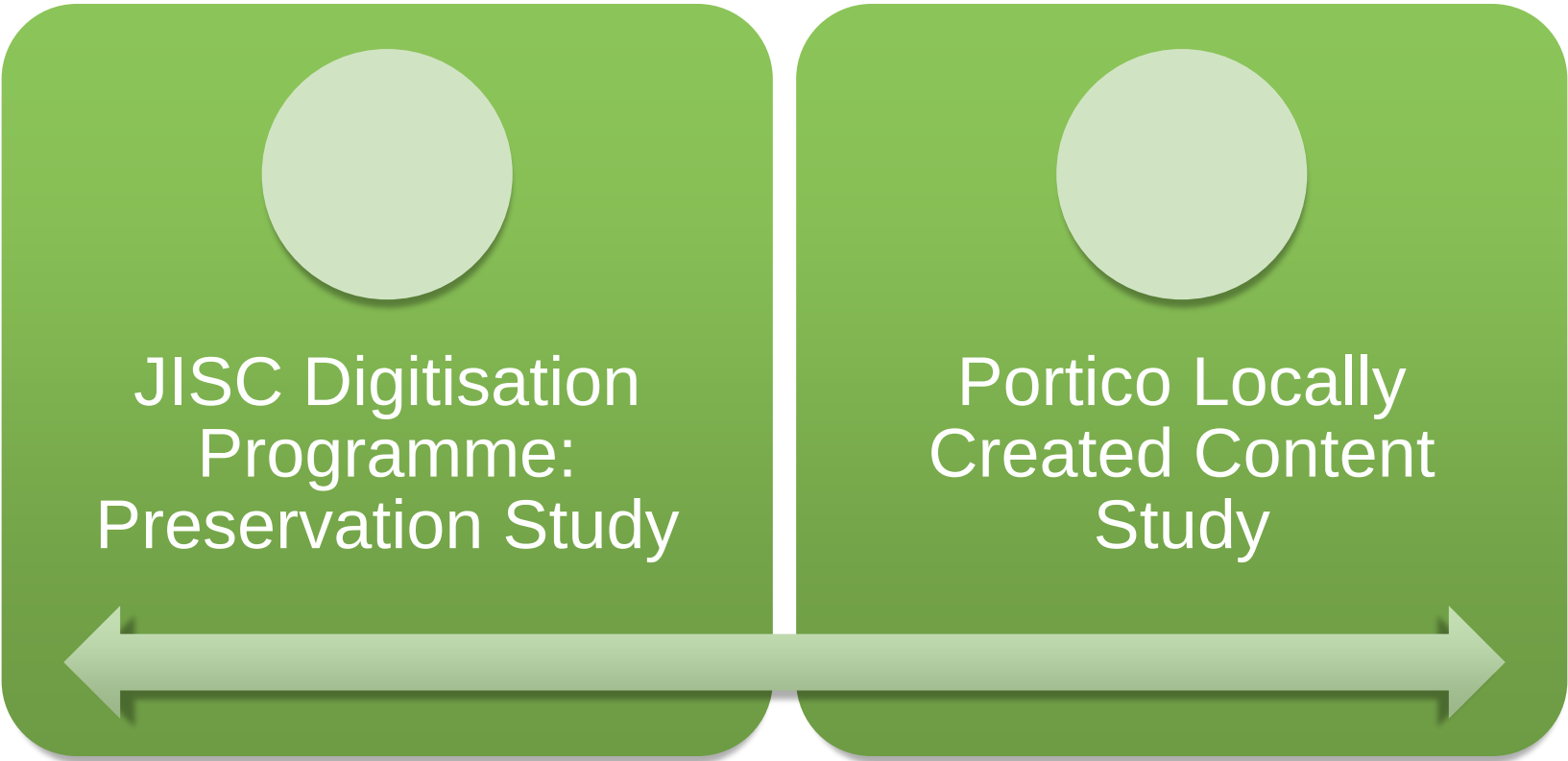
The NEH and IMLS awarded a grant to Portico, in partnership with Cornell University Library, through the “Advancing Knowledge: The IMLS/NEH Digital Partnership grant program” to develop a practical model for how preservation can be accomplished for digital content at cultural heritage organizations.

White Paper:

<http://www.portico.org/presentations-publications/>

A Preservation Model





JISC Digitisation
Programme:
Preservation Study

Portico Locally
Created Content
Study

Many thanks to JISC and NEH for funding.

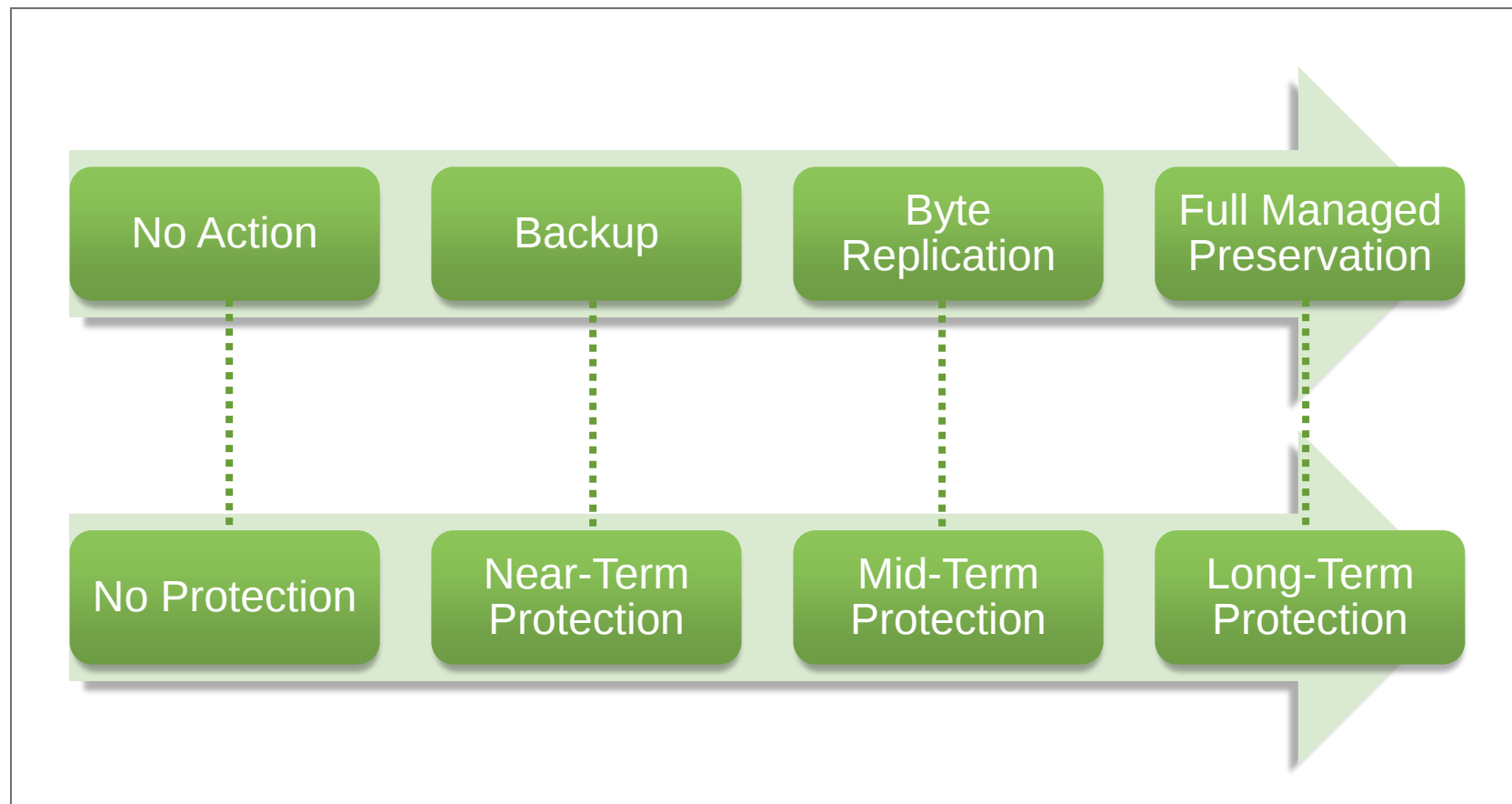
Reasonable Preservation Questions

- The IT department backs up the server, is that sufficient?
- We make a tape backup every 3 months, are we covered?
- The high resolution master files are on an external drive in Joe's office, is that OK?
- Can we keep this collection safe without preserving it?
- What will make this digital collection "safe enough"?

IT DEPENDS...

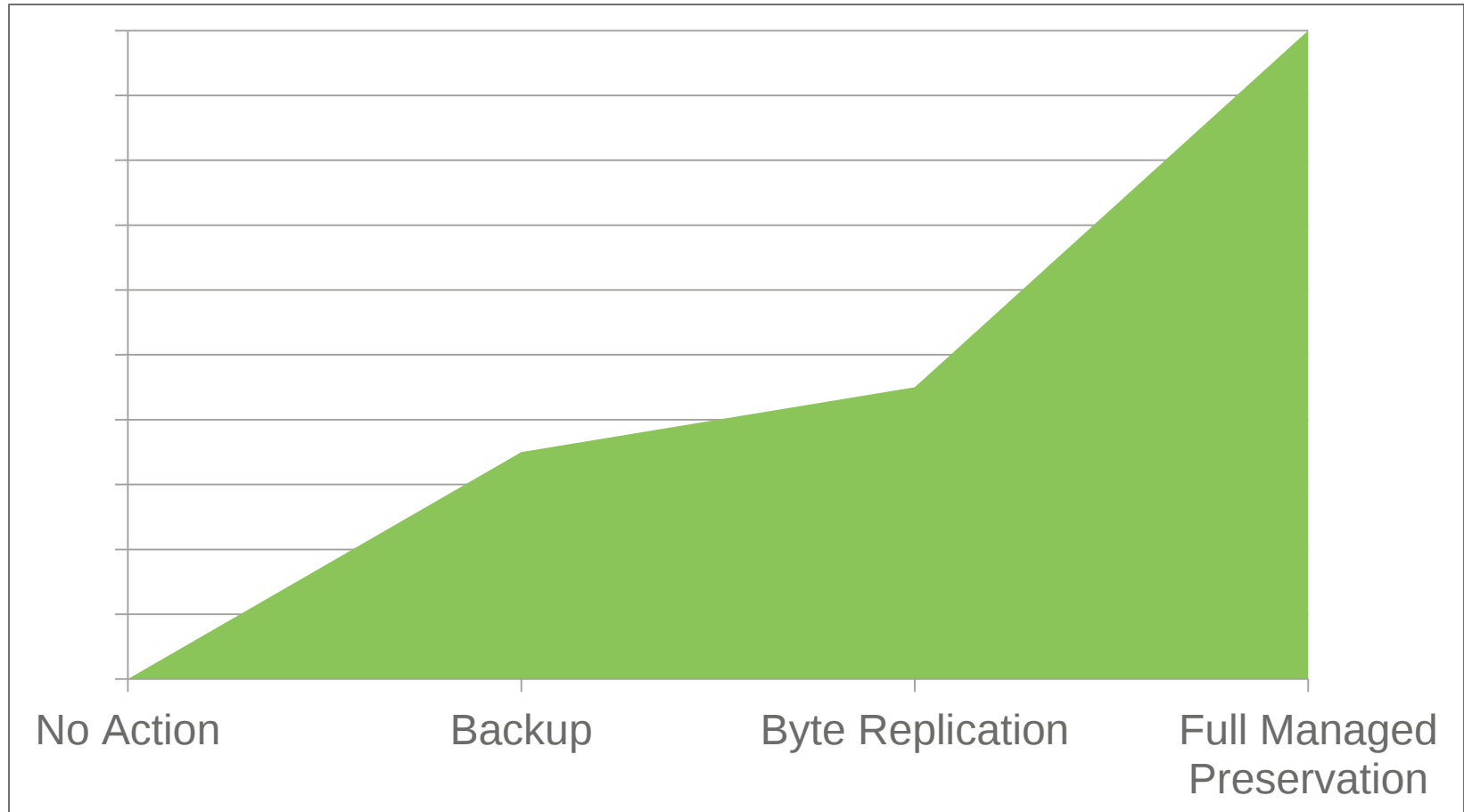


Reasonable Preservation Questions



CONTENT PROTECTION CONTINUUM

Reasonable Preservation Questions



CONTENT PROTECTION CONTINUUM II

Digital preservation is the series of management policies and activities necessary to ensure the enduring usability, authenticity, discoverability, and accessibility of content over the very long-term. The key goals of digital preservation include:

Usability

- the intellectual content of the item must remain usable via the delivery mechanism of current technology

Authenticity

- the provenance of the content must be proven and the content an authentic replica of the original

Discoverability

- the content must have logical bibliographic metadata so that it can be found by end users through time

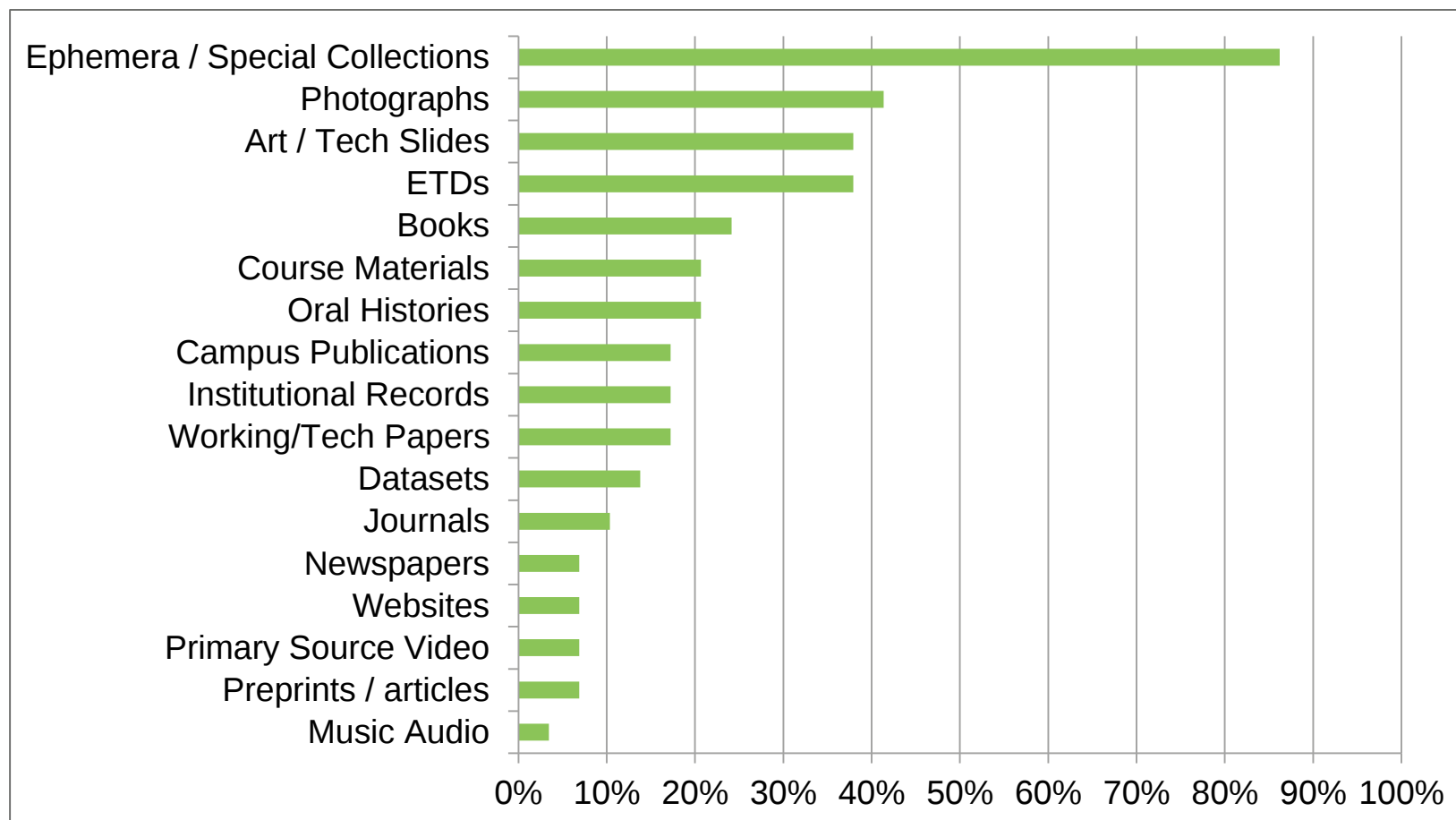
Accessibility

- the content must be available for use to the appropriate community

FULL MANAGED DIGITAL PRESERVATION

ANALYSIS FROM THE STUDIES

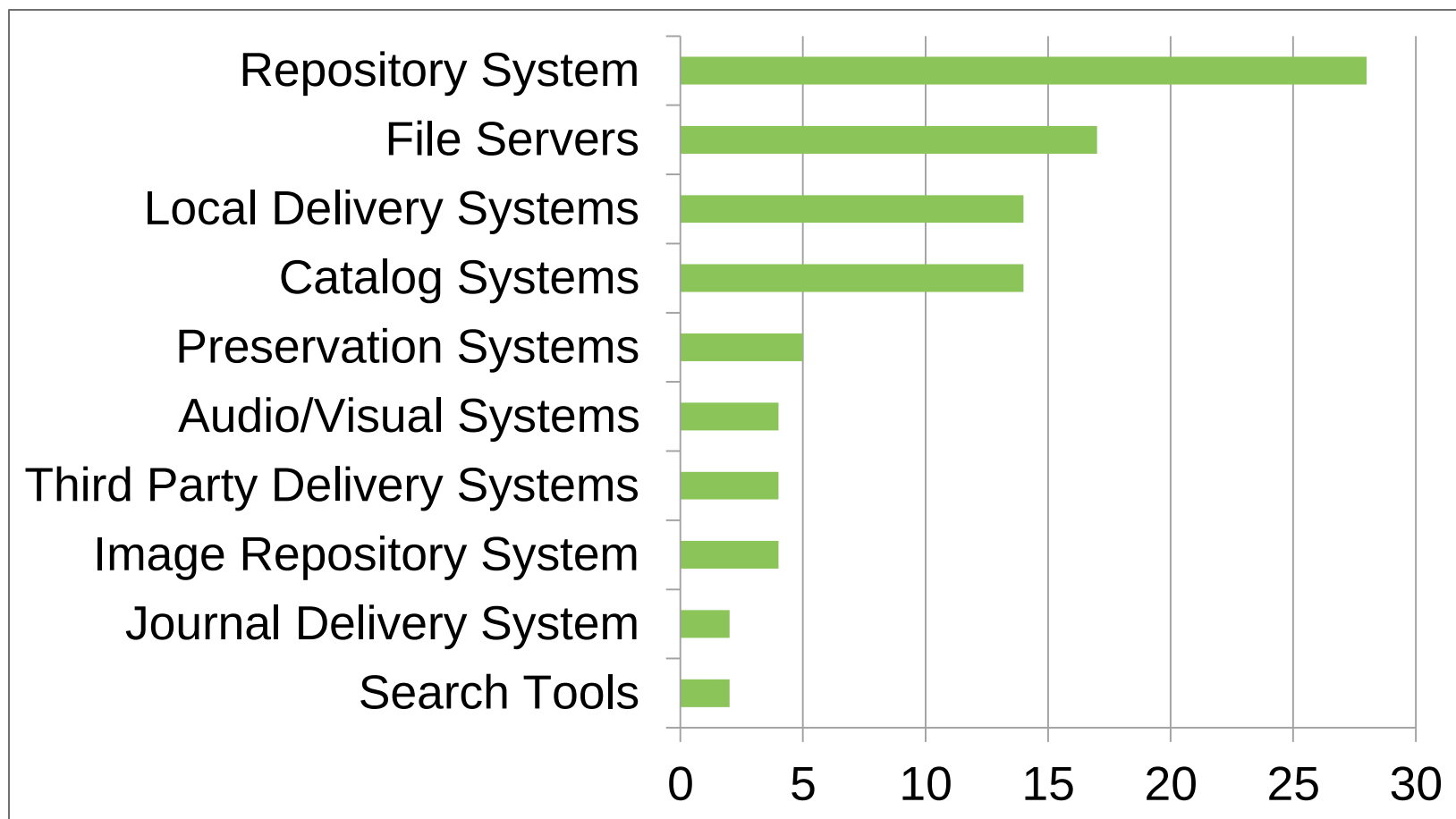




DIGITAL CONTENT CONSIDERED IN STUDIES

The 27 institutions, and at least 30 projects, reviewed were using:



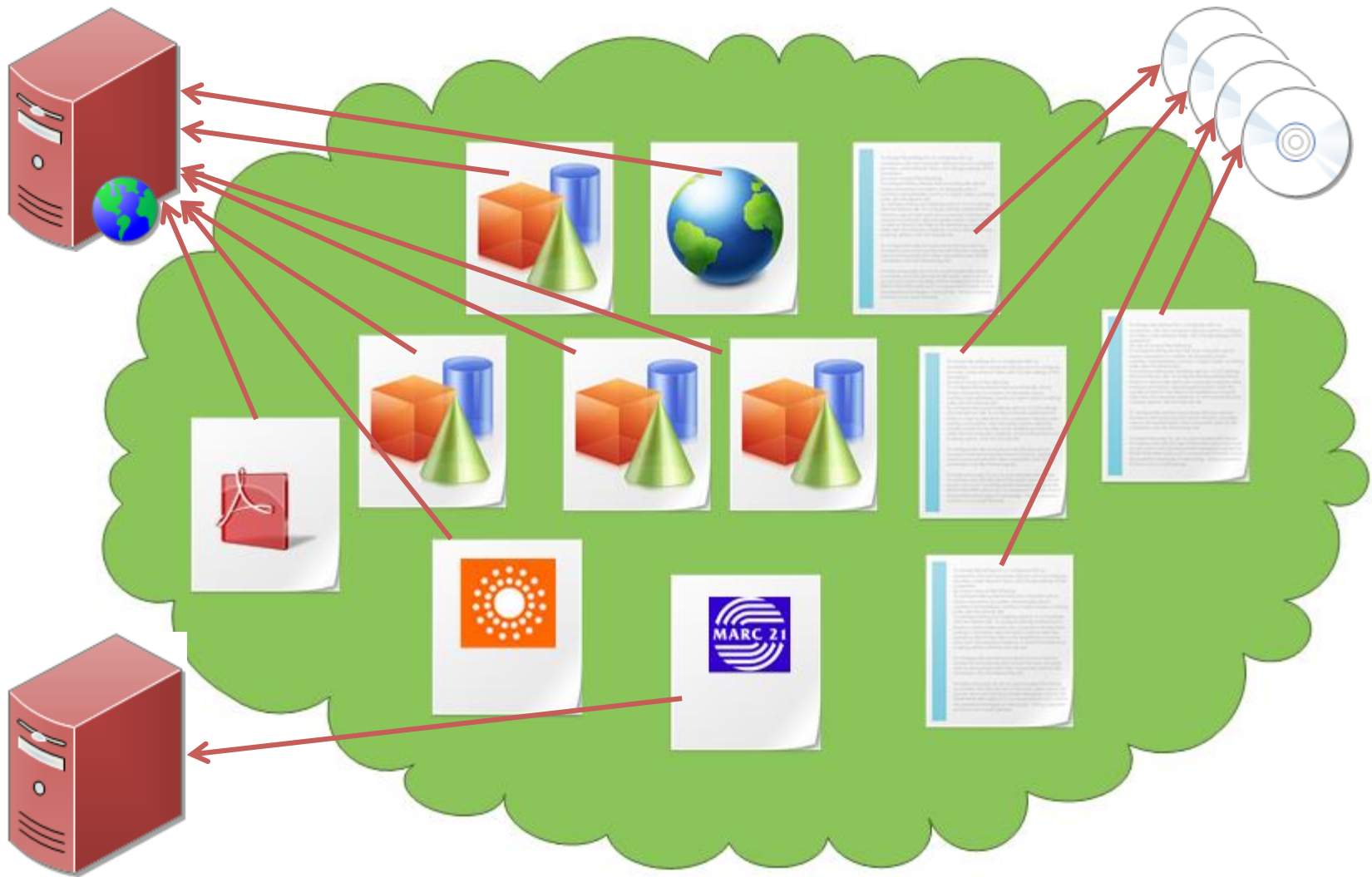


COUNT OF INDIVIDUAL INSTANCES OF TYPES OF SYSTEMS
IN USE ACROSS ALL ORGANIZATIONS

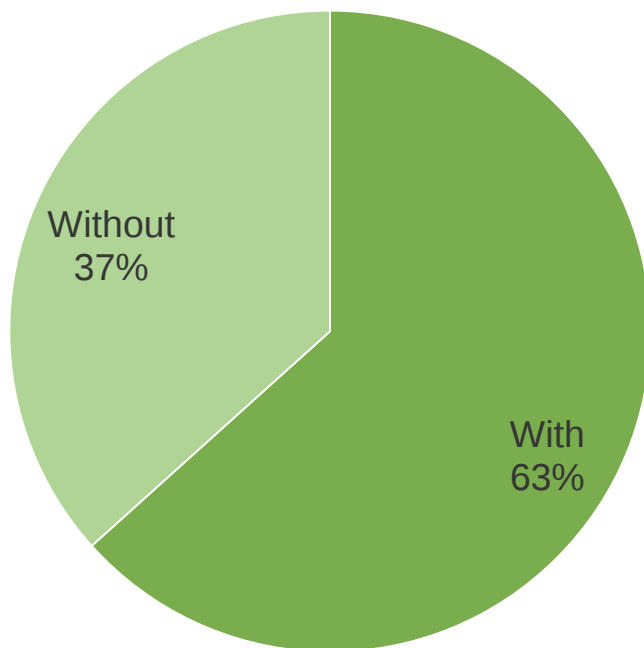
Survey Analysis



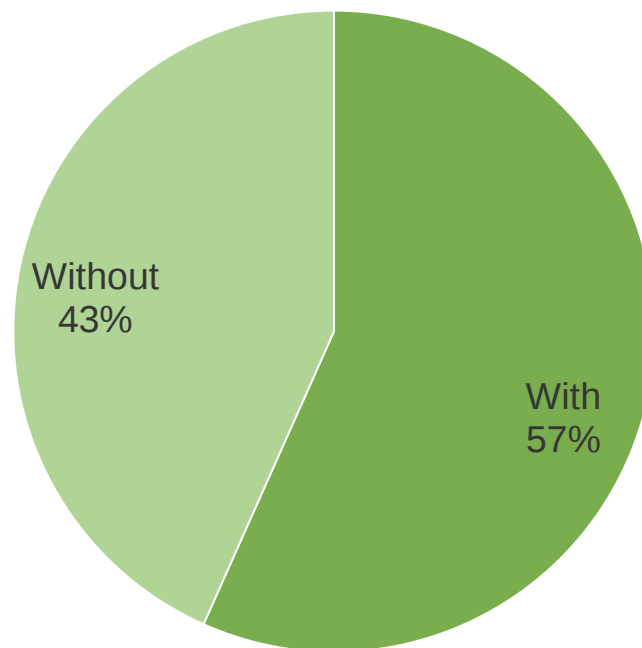
Survey Analysis



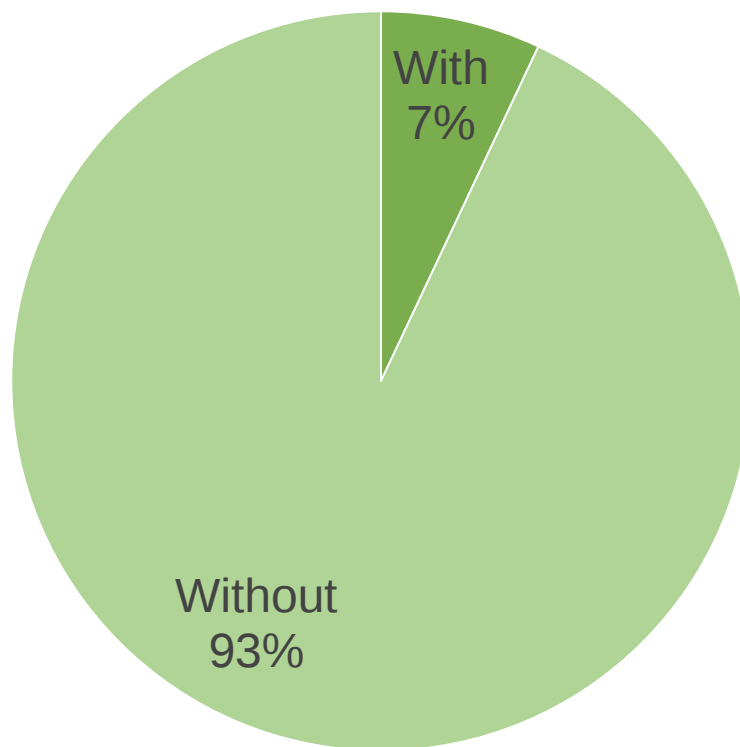
**Institutions with
InterInstitutional
Collaborations**



**Institutions with
IntraInstitutional
Collaborations**



COLLABORATION



INSTITUTIONS WITH AND WITHOUT PRESERVATION POLICIES

Survey Analysis – Additional Themes



The size of a cultural heritage organization is neither a predictor for risk nor amount or quality of digital content.



Many cultural heritage organizations do not have staff to support either preservation or access systems in-house.



Cultural heritage organizations would benefit from a turn-key solution that provides both access and preservation for a large variety of formats and content types.



Cultural heritage organizations do not often have a sustainability plan associated with their digital content. The digital content is not considered a product that must be sustained, it is considered another outlet for their special collections.

INITIAL STEPS TO PROTECT CONTENT



Initial Steps to Protect Content

1 Locate all content

2 Initiate regular backups

3 Test retrieval from backups

4 Develop a long-term preservation plan

PRESERVATION (OR PROTECTION) PLANNING

1

Who: Identify the key players involved with long-term preservation of the targeted content

2

What: Describe or characterize the collection and content

3

Where: Document the locations of all the copies of the content and metadata.

4

When: Document the targeted preservation timeframe and impact of loss.

5

How: Document how the key content management and preservation tasks will occur.



Initial Steps to Protect Content



WHY BACKUP?

Initial Steps to Protect Content

CALCULATING
A BACKUP
SOLUTION

$$1 + 1 = 2$$



Initial Steps to Protect Content

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CALCULATING A BACKUP SOLUTION

$$1 + 1 = 2$$

$$1 + 11 + .33 + 3 - 11 +$$

$$.58 + 51 + .09 \div 28 = 2$$

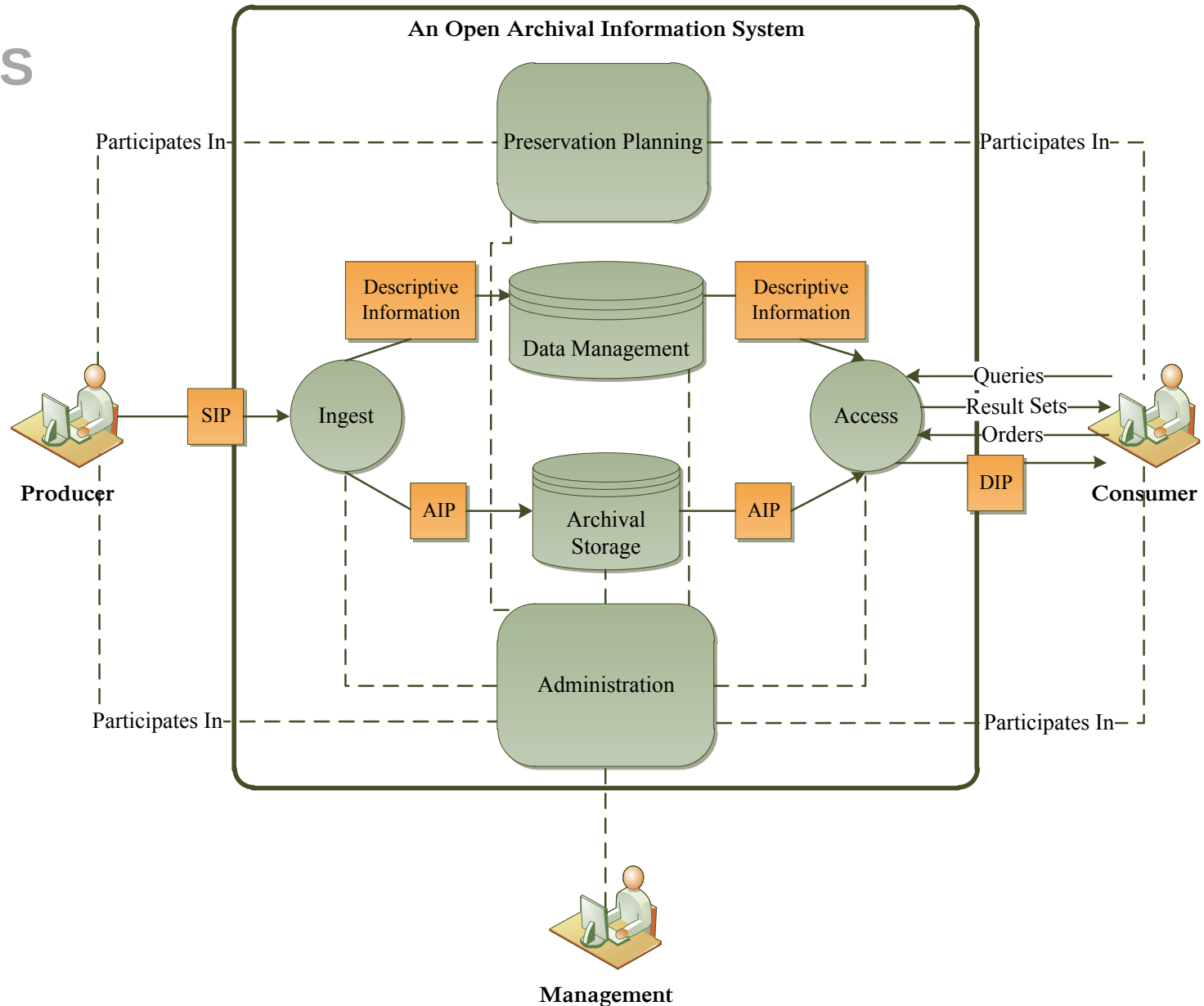


PRESERVATION



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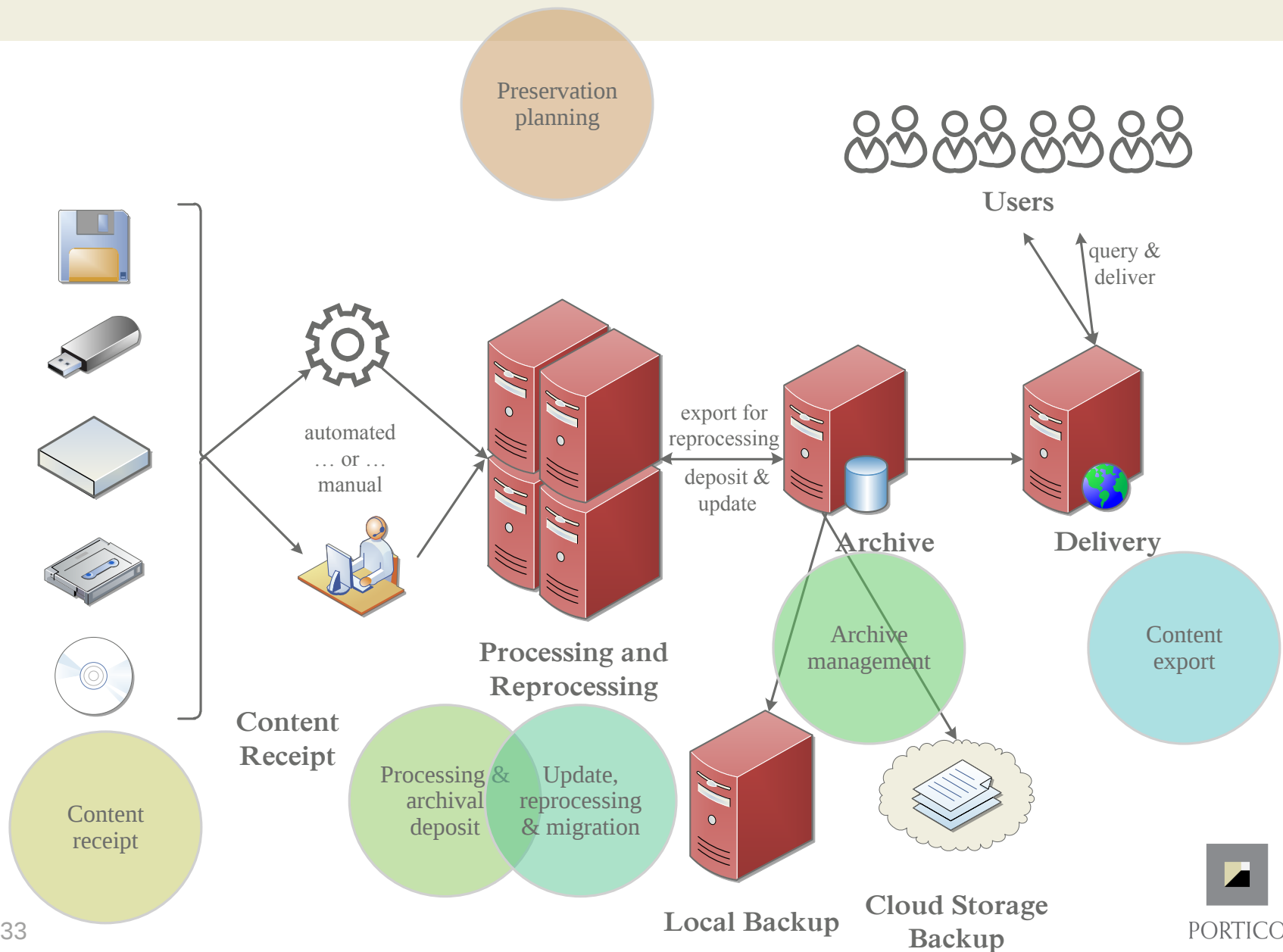
OAIS



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A Preservation Model for



Cultural Heritage Organizations

SELECTING SOFTWARE

Will the software meet your input throughput needs? Will it meet your batch or otherwise loading needs?

Will the software meet your output throughput needs?

How complicated is the software to manage? Do you have appropriate staff to both install the software and maintain it over time?

Will the software capture the preservation metadata you have identified as necessary in your policies?

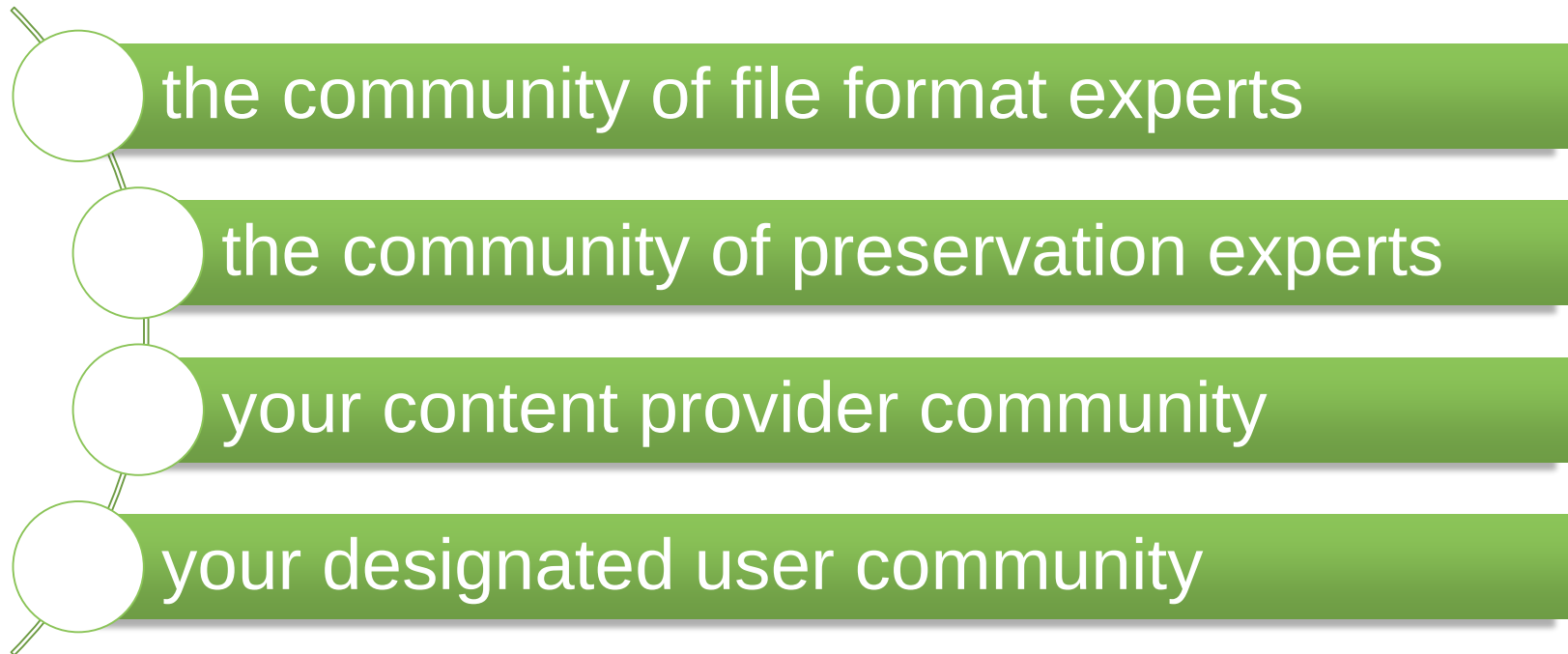
Can the software support maintaining the original master versions of your content files and the web-ready versions of your content files side-by-side with the metadata for the files?

Can the software export the original master version of your content files with the metadata for those files?

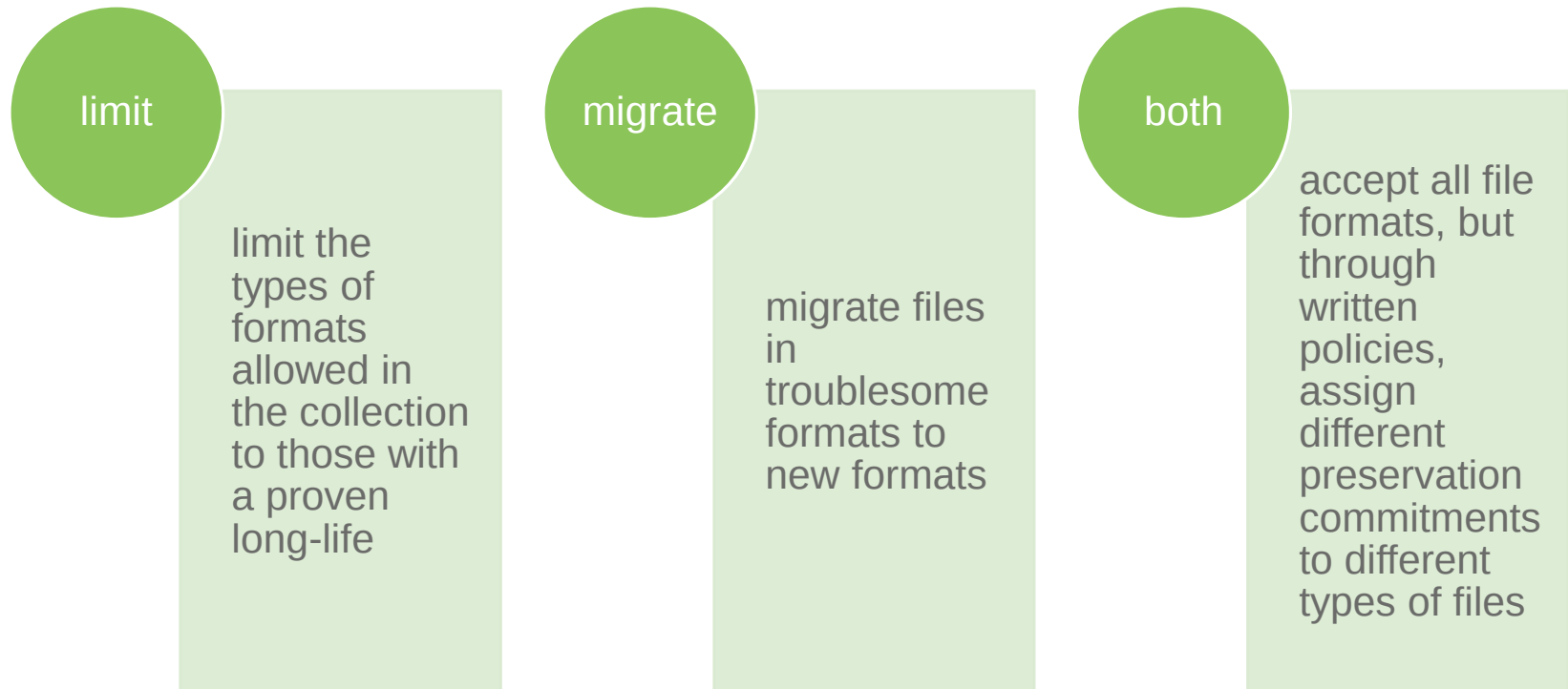
How much does the software cost initially? Consider both internal costs such as staff time and external costs.

How much will it cost to maintain? Consider both internal costs such as staff time and external costs such as licensing fees.

COMMUNITY MONITORING



A Preservation Model



CONTENT FORMATS

PRESERVATION POLICIES

<Preservation Policy Title>

1. Policy Statement

- 1.1. <Paragraph 1 in high level policy statement>
- 1.2. <Paragraph 2 in high level policy statement. This section should be short, but accurate and to the point. It should provide guidance to operations staff as they do their jobs.>

2. Implementation Examples

- 2.1. <Example 1>
- 2.2. <Example 2 – examples should describe practical decisions made based upon this policy.>

3. Document History

- 3.1. Approved by: <Name of approver>
- 3.2. Last Review Date: <Date policy was last approved>
- 3.3. Reviewed by: <Names of people who reviewed the document at its last review date>
- 3.4. Change history:

Version	Date	Change	Author
<version #>	<date finalized>	<Highlight the changes made to the document>	<author of the changes>
<version 2>*	<date finalized>	<Highlight the changes made to the document>	<author of the changes>

* An approved version of this document.

A Preservation Model

METADATA & PACKAGING



A Preservation Model

METADATA & PACKAGING

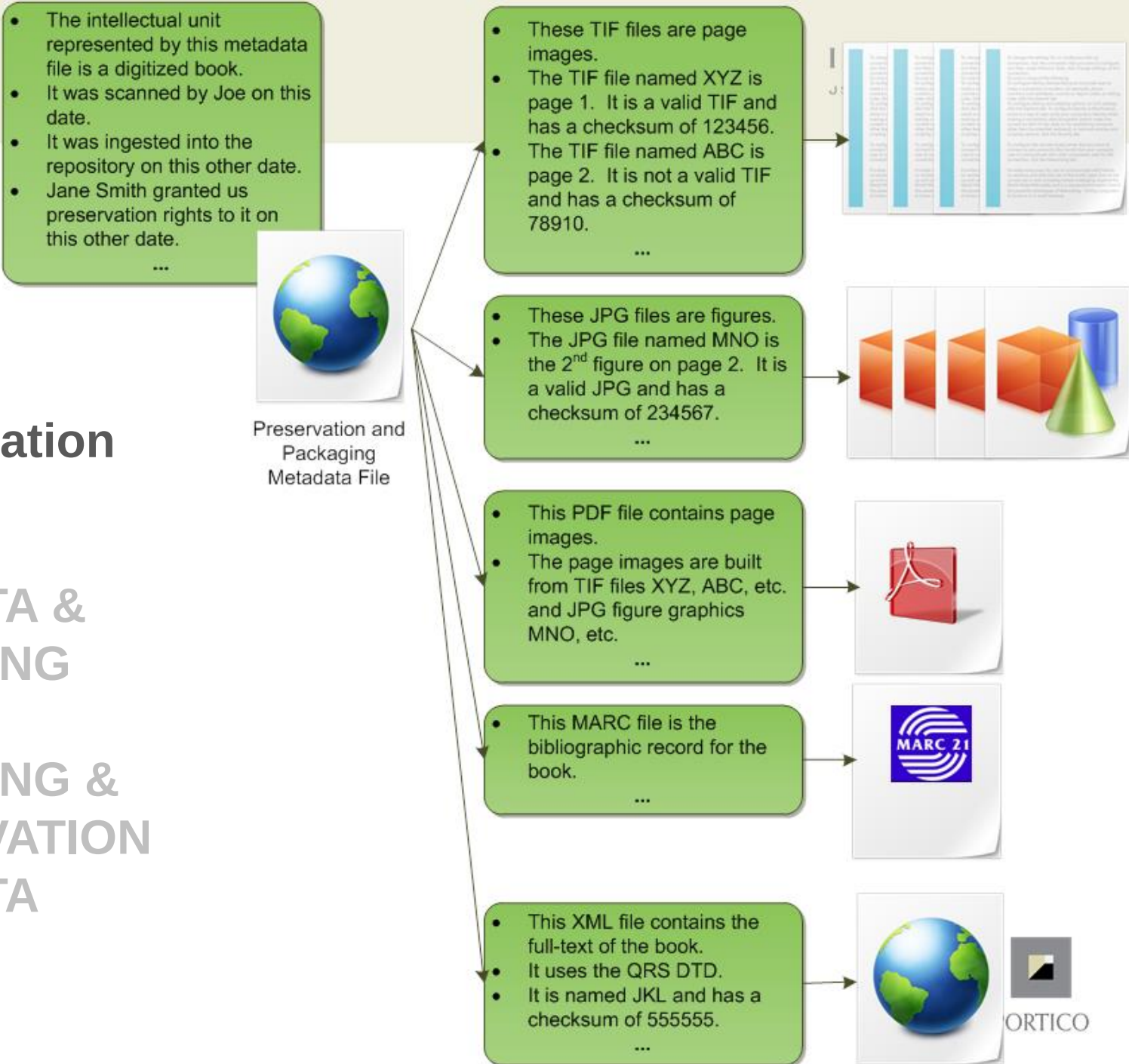
PACKAGING



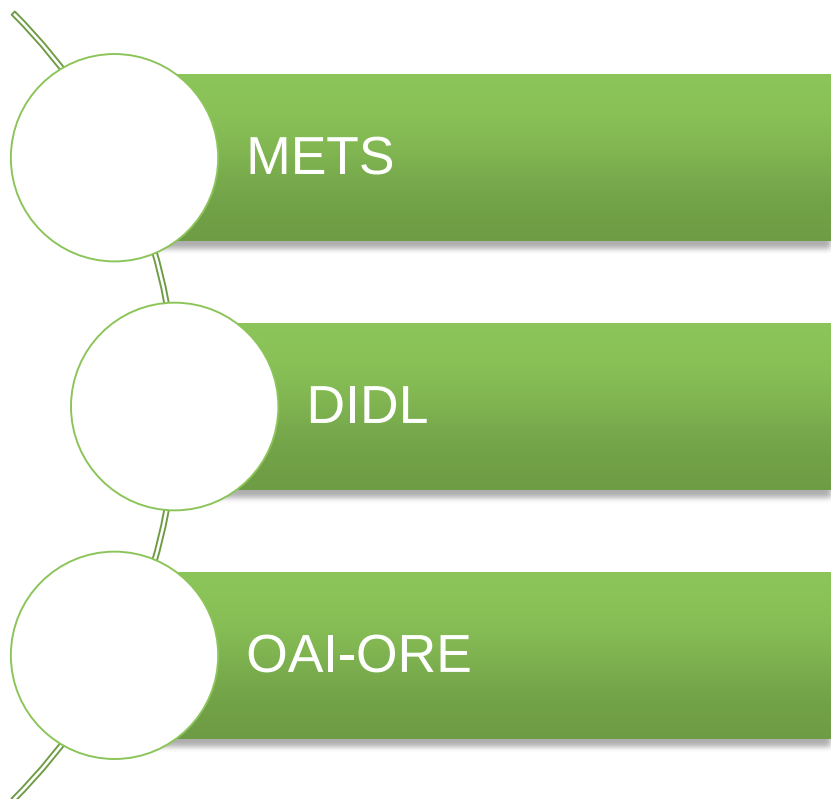
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METADATA & PACKAGING

PACKAGING & PRESERVATION METADATA



PACKAGING



PRESERVATION METADATA



Access rights are not preservation rights

Get preservation rights at the point of deposit

Document preservation rights in the preservation metadata

Tricky area – embedded content

Tricky area – research and privacy rights

RIGHTS

A Preservation Model



COSTS



RECOVERING COSTS

Allowing sponsorship of the collection

Permitting advertising on the collection

Encouraging donations to support the collection

Building an endowment

Creating premium services for purchase, the revenues from which can subsidize the preservation service.

Enlisting support from funding bodies, scholarly and professional societies, and publishers

Charging for access to the collection and using the revenue to subsidize the preservation costs.

Charging for participation in the preservation service

Relying upon support from a parent organization or government

A Preservation Model

Do-It-Yourself

Collaboration

Third Party Preservation Service

ORGANIZATIONAL MODEL



A Preservation Model for

Cultural Heritage Organizations





PORTICO

THANK YOU.

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PORTICO