Policies and Practices
The MetaArchive Cooperative

PLN 2010
Boston College, October 25, 2010
Organizing principles

- Why LOCKSS?
- Preservation partnership
  - Balance of flexibility and fragility
  - Strong organizational center
  - Limited dependence on any one member
- Curators are not just Producers interacting with a Repository; they are part of the Repository

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Presentation Overview

- MetaArchive’s two tiers of policy activity
  - PLN-wide
    - Governance (Charter/Membership Agreement)
    - Documentation (wikis & business plan)
    - Accountability (External and Internal Audits)
  - Local/institutional
    - Workshop
    - Planning/Policy development materials

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Governance

- Charter, Membership Agreement, Technical Specifications
  - Core organizational document set
  - Outlines mission and operating principles
  - Details roles, relationships, and responsibilities of members and central infrastructure

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Governance

- Charter
  - Membership, Organization and Governance, Services and Operations
- Membership Agreement
  - Definitions, Membership levels/costs/terms, Rights and Responsibilities
- Technical Specifications
  - Recommendations/requirements for staffing and hardware

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Example Member Responsibilities

- Undertake a 3-year membership term;
- Take responsibility for content preparation, evaluation, staging, and plugin development;
- Monitor collections to ensure accurate long-term preservation;
- Host and maintain a MetaArchive cache;
- Maintain membership in LOCKSS Alliance.
Example Central Responsibilities

- Guarantees members’ control over their own content;
- Advises, assists, and evaluates member plugins/collections to ensure accurate ingests;
- Hosts centralized infrastructure for the network;
- Monitors both the network and each collection to ensure preservation operations;
- Provides ongoing reports to members about the status of their content and cache;
- Retrieval of member content in case of local catastrophic loss
Documentation

- Wikis (2)
  - Distributed staffing = need for solid “how to” documentation
  - Technical and organizational info
    - Plug-in how tos, administration and reporting how tos, content policy, collection allocations

- Preservation Business Model
  - Foundational info
    - Strategic, Operations, Management, Marketing, Financial, and Risk Assessment Plans

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Accountability

- 2007 NEDCC Preservation Assessment
- 2010 TRAC Assessment
  - [http://metaarchive.org/resources](http://metaarchive.org/resources)
  - conforms in all 3 categories and 84 criteria
  - “trustworthy digital repository”...ensures that processes and policies and workflows meet the standard for long-term preservation
  - Helped us identify places where we could improve our policies and documentation

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Member Policies and Planning
Lack of institutional policies = endemic in our field

Preservation practitioners are no exception

Preservation partnership

- Develop workshop to help members get this political work off the ground locally
- Designed templates, surveys, planning tools that members may use as they do so
Questions/Comments?