

PALMPrint: Lessons Learned From a Shared Print Collection

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Print Archive Network Forum (PAN)

January 20, 2017



What Is PALMPrint?

Preserving America's Legal Materials in Print (PALMPrint) is a print repository devoted to a legacy collection of U.S. federal and state primary legal materials. Developed by the Legal Information Preservation Alliance (LIPA) and the NELLCO Law Library Consortium (NELLCO), this project began as a three-year (2013-2016) pilot intended to prove the concept of a shared, discipline-specific collection, jointly owned by the sponsoring organizations and the participating libraries.

Planning Timeline

- ▶ Spring 2011, Summit on Print Repositories
 - ▶ Invited experts in the field to discuss the concept
 - ▶ Collection focus changed from law journals to primary legal materials
- ▶ Fall 2011, Advisory Committee assembled
 - ▶ Collection plan
 - ▶ Donations
 - ▶ Storage
 - ▶ Funding

Planning - Part 2

- ▶ Spring 2012
 - ▶ Request for Proposal (RFP)
 - ▶ Site visits to storage facilities
- ▶ Fall 2012
 - ▶ Selection of repository site
 - ▶ Marketing plan with PALMPrint name and logo
- ▶ Spring 2013
 - ▶ Series of webinars
 - ▶ Memorandum of understanding

Project Launch

- ▶ May 2013
 - ▶ Pilot project launched with 65 subscribers
 - ▶ Four donor institutions
 - ▶ Joint ownership under a legal theory of personal property ownership called joint tenancy
 - ▶ Subscription fees and underwriting from LIPA and NELLCO
 - ▶ First year move of 58,000 volumes
 - ▶ Simple interface for discovery and retrieval

What Makes PALMPrint Unique?

- ▶ It is a shared collection, jointly owned by the two sponsoring organizations and the participating libraries.
- ▶ It is focused on a single discipline, which is not unique but is unusual. PALMPrint is and always will be about print legal materials.
- ▶ It has a foundational collection development plan that can and will be expanded over time as collection goals are reached. PALMPrint is a collection, not merely a storage facility.
- ▶ The collection is centralized in a remote storage facility that does not belong to any of the participating institutions.
- ▶ Subscribing libraries do not have to commit to retain any titles in their own collections, because PALMPrint is there when they need it.
- ▶ The collection holds a single copy of each title selected, so there is no need for complex formulas to determine the appropriate number of copies to retain for specific categories of material.
- ▶ The project's goals are both preservation and access. While not a dark archive, this legacy print collection is widely replicated in digital form, so we expect low use and minimal physical impact to the materials.
- ▶ PALMPrint is a highly collaborative model, driven by two library consortia and many of their member libraries.

Lessons Learned

- ❖ Preliminary Planning
- ❖ Technology
- ❖ Communication
- ❖ Assessment

Lesson1: Preliminary Planning

- ▶ Research, literature review, and conversation with colleagues demonstrated that there was and still is a real need for this project.
- ▶ We achieved the right balance between making decisions that were fundamental to the pilot project before it started and leaving less essential decisions to be made later.
- ▶ Original donor libraries participated in the pilot project at no charge, but we neglected to address how they would be treated after the pilot phase or how we would treat subsequent donor libraries.
- ▶ We made effective use of our boards and advisory committees, but the project created a significant workload for staff, i.e. the executive directors.

Lesson 2: Technology

▶ Storage and retrieval

- ▶ the barcode-based retrieval system is simple and straightforward
- ▶ our vision of a simple interface (title, author, volume number, OCLC number) was made more difficult because of the nature of legal materials
- ▶ assumptions made on both sides caused misunderstandings throughout the pilot

▶ Discovery

- ▶ few authors, lengthy and similar titles, importance of volume number/date
- ▶ inconsistent use of MARC fields by donor libraries

▶ Delivery

- ▶ few requests to date so implementation of physical delivery has not been tested
- ▶ digital delivery may not be feasible for some legal materials

Lesson 3: Communication

- ▶ Ad hoc communication vs. planned communication
- ▶ Regular communication with our Boards
- ▶ Sporadic communication with stakeholders:
 - ▶ donor libraries
 - ▶ subscribing libraries
 - ▶ non-subscriber member libraries
 - ▶ William B. Meyer Co.
 - ▶ outside organizations

Lesson 4: Assessment

- ▶ Assessment plan was loosely defined
 - ▶ timeline corresponded to the three years of the pilot project
 - ▶ no benchmarks for success or markers for failure
- ▶ PALMPrint is based on a theory of low demand
 - ▶ standard library usage metrics aren't helpful
- ▶ Fall 2014 meeting with participating libraries
 - ▶ key moment for engaging stakeholders
 - ▶ built consensus on a number of questions and future directions

Permanence and Sustainability

- ▶ Appointment of a Futures Committee in 2015
 - ▶ decision not to expand until we complete the comprehensive collection of primary U.S. federal and state legal materials
 - ▶ priority is identifying and filling the gaps in the collection
 - ▶ plan for a permanent project with no new subscribers and a lower annual cost
 - ▶ enhance the user interface to improve discovery
- ▶ Challenges for 2016-17 and beyond
 - ▶ establish a permanent advisory committee structure
 - ▶ improve the user interface
 - ▶ implement the delivery models
 - ▶ establish a long-term sustainable business model
 - ▶ plan for transitions in staffing

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