

# Checklist for Potential Donors

## What to Discuss With the Library

Note: You may want to consider seeking advice from a legal professional when working with a repository on a contract or agreement.

- Ask repository for guidance and documentation on
  - determining the most appropriate repository for the digital materials.
  - deciding on the type of transfer in terms of the acquisition agreement or contract as it relates to born-digital materials.
  - describing the context and history of the files and media being transferred
  - handling digital media.
  - storage of the material and the transfer of digital media and files.
  
- Clarify expectations about the extent to which the digital materials on offer will be preserved and made available for use. This is usually document in the acquisition agreement and can take the form of a transfer of ownership (preferred) or an exclusive or non-exclusive license.
  
- Consider consulting repository technical staff about what guidelines to follow when copying and transferring media and files.
  
- Discuss with repository staff the variety of deleted information that may be present in digital files and media, and come to an agreement about how such information will be handled and made available to researchers.
  
- Determine whether computer equipment or peripherals are offered and/or desired as part of the donation.
  
- Seek guidelines from the repository for the shipping of hardware or transfer of digital files.

## Reviewing Your Materials

- Clearly identify which born-digital materials are to be offered to the repository. Determine which files on the media need to be restricted or redacted, and to what degree, and when these limitations may expire.

- Avoid manipulating, rearranging, extracting, copying, or otherwise altering data residing in the original source media unless instructed to by staff in anticipation of offering the materials to the repository.
- Review material for inconsistent or uninformative files names. Ask staff for guidance for changing file names without changing metadata. If this action cannot be performed by the donor, provide written details of the subject of files.
- Consider screening e-mail files for sensitive or extraneous messages. When this is not possible, consider appropriate embargo periods and discuss restrictions on access to e-mail before that date with the repository.
- Review material for any intellectual property not belonging to the donor. Inform staff of any instances.
- Review material for sensitive and/or legally protected private files, such as confidential government files, medical records, legal case files, Social Security and credit card numbers. Inform staff of any instances.
- Write a personal computing history to provide context for the digital media and computers in the acquisition.
- Document the ways in which digital media and files have been stored, accessed, and transported prior to their arrival at, or collection by, the repository.
- Document any encryption, passwords, or logins that would be necessary to access the material.

## Expectations

- The repository will retain the original digital media unless the acquisition agreement indicates otherwise.
- The repository will communicate with the donor during the capture and processing of digital materials.
- The electronic copying and transfer of files can take a significant amount of time

### **Sources:**

“Checklist of Recommendations for Donors and Dealers”, Council on Library and Information Resources

<https://www.clir.org/pubs/reports/pub159/pub159.pdf>