

Pre-Appraisal Conversation with a Donor - Guide for Staff

This guide is to help navigate conversations with donors to gather information needed for appraisal and processing of digital records. Detailed provenance and technical metadata collected through the Pre-Appraisal conversations is vital for appraisal, processing, and access. It is important to not make conversation jargon heavy (for example, checksums, file fixity) and to use terminology that the donor is familiar with.

Pre-Appraisal Conversation Prompts:

- Please give us the background to the creation of the records*?
 - What story do these records tell?
 - What is the archival significance of these records?
 - What is the enduring historical value of the records?
- Did the donor create the records or were they created by someone else?
 - Are the records digitized or scanned copies of analogue records?
 - If the records were digitized or scanned by the donor, does the donor still have the original analogue (or physical) record?
 - Are the digital records unique to the donor or copies from the internet or another source?
- What types of files are there? For example, text, images, photographs, spreadsheets, databases, audio, video etc.? What are the broad categories of the files?
- How did/does the donor organize the records?
- What software or hardware did the donor use to create the records?
 - What are the file formats included in the donation?
- Any licence concerns?
 - What can the archives do with these records?
- Does the donor need proprietary (specialized) software to access the records?
 - Will the archives need special software for processing the records?
 - Will the archives need special software to provide access to the records?
- Do the records contain personal or sensitive information?
- When were the records created?
- Where are the records stored?
 - For example, in an email account, floppy disks, Google Drive, external hard drive
 - Are the records stored on the donor's physical computer, external media or in the Cloud or on the internet?
- What is the extent of the files?
- Can the donor provide a summary or screenshot of the file count and sizes?

**This document uses the term 'records' to describe the stuff included in a donation inquiry - depending on the context, donors might be more familiar with describing the records as 'digital files' or 'digital assets'.*