

## Checklist of Recommendations for Donors and Dealers

### Initial Collection Review

Avoid manipulating, rearranging, extracting, copying, or otherwise altering data residing in the original source media in anticipation of offering the materials for gift or purchase; or, do so in accordance with established guidelines provided by the repository.

Ask repositories for guidance and/or documentation on:

- o Determining the most appropriate repository for your digital materials
- o Negotiating the terms of an acquisition agreement or contract as it relates to born-digital materials
- o Describing the context and history of the files and media being transferred
- o Handling digital media
- o Documenting storage, access attempts, copies, and transport 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.

### Privacy and Intellectual Property

Consider screening email files for sensitive and/or extraneous messages. When this is not possible, consider appropriate embargo periods and discuss restrictions on access to email before that date with the repository.

Inform repository staff if there is a possibility that your digital records include the intellectual property of people besides the creator or donor of the materials.

Inform repository staff if there is a possibility that your digital records include legally protected private files, such as confidential government files, medical records, and legal case files, and other kinds of sensitive information, such as Social Security and credit card numbers.

Consider whether a repository should be allowed to decrypt passwords and/or logins.

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 (e.g., perhaps after an embargo period).

### Key Stages in Acquiring Digital Materials

Discuss whether the repository will be the exclusive owner of the digital files you transfer, and whether and how copies of the digital files will be allowed.

Clearly identify which born-digital materials are to be offered to the repository.

If offering digital media to a repository, determine whether all files on the media can be captured and made accessible, or only certain types of files.

### **Key Stages in Acquiring Digital Materials (continued)**

Be prepared for the repository to retain the original digital media unless the donor or repository indicates otherwise.

Determine whether limited, specific files or information need to be restricted or redacted and when those restrictions will expire.

Consider seeking advice from a legal professional when working with the repository on a contract or agreement.

If a donor has a technical specialist, consider involving her in conversations with repository staff about what guidelines to follow when copying and transferring media and files.

Be prepared to have ongoing communications with the repository during the capture and processing of digital materials.

Determine whether earlier computer equipment is still in the donor's possession and can be offered as part of the acquisition.

Consider writing a personal computing history to provide context for the digital media and computers in the acquisition.

Seek guidelines from the repository for shipping of hardware or transfer of digital files.

Document how digital media and files have been stored, accessed, and transported prior to their arrival at, or collection by, the repository.

Be prepared for electronic copying and transfer to take a significant amount of time, and for repository staff to develop new capture techniques to accommodate novel acquisition scenarios.

### **Post-Acquisition Review by the Repository**

Include information about physical damage to digital media in the initial collection inventory or survey. Noting damaged digital media is as important as disclosing damage to paper materials. Digital photographs of media and equipment may be helpful.

Remain open to ongoing communication with repository staff about the acquisition.

Consider the likelihood that media damaged in shipping or files corrupted in transfer have lost their cultural value. This possibility underscores the importance of agreed-upon transfer methods.

