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The Materials Curation Inventory Toolkit: Interview Worksheet

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Name of Interviewee: _____

Department or Center: _____

Institution: _____

This worksheet is designed to elicit the information necessary to develop an inventory of materials produced by a particular research project and targeted for curation. In your responses to this worksheet and to the interview questions, please limit your focus to the materials associated with the particular research project you have selected.

This worksheet is meant to be filled out as a part of the interview and your responses to the questions in each module will serve to guide the conversation. The interviewer will then ask you some follow up questions about your responses to gather additional details and to better understand the materials, your priorities and needs for the curation process.

If you have any questions, need more information, or would like clarification about any item listed in this worksheet, please do not hesitate to ask your interviewer.

Please do not turn the page until you are asked to do so.

Module 1 – The Materials

Please provide a brief description of the deliverables and other materials that resulted from your project:

Please provide a brief list of categories of materials (handouts, workshop scripts, computer code, datasets, video tutorials, audio interviews, etc.) and the estimated size/number of files within each category.

Category 1 _____	Estimated Size/ Number of Files _____
Category 2 _____	Estimated Size/Number of Files _____
Category 3 _____	Estimated Size/Number of Files _____
Category 4 _____	Estimated Size/Number of Files _____
Category 5 _____	Estimated Size/Number of Files _____
Category 6 _____	Estimated Size/Number of Files _____
Category 7 _____	Estimated Size/Number of Files _____
Category 8 _____	Estimated Size/Number of Files _____
Category 9 _____	Estimated Size/Number of Files _____
Category 10 _____	Estimated Size/Number of Files _____

Continue with additional categories below and on the back of the page as necessary to reflect your project deliverables.

Module 2 – The Lifecycle of Materials Creation/Production

1. Initial Stage: _____

- Approximately how many files exist at this stage?

- What is the approximate average size of each file at this stage?

(Please include the unit of measurement – kb, MB, GB, etc.)

- What format(s) are the files or artifacts in?

(For example: MS Excel 2007, MySQL database, JPEG 2000 images, a raw data file from a Campbell CR10 data logger, etc.)

2. Second Stage: _____

- Approximately how many files or artifacts exist at this stage?

- What is the approximate average size of each file at this stage?

(Please include the unit of measurement – kb, MB, GB, etc.)

- What format(s) are the files or artifacts in?

(For example: MS Excel 2007, MySQL database, JPEG 2000 images, a raw data file from a Campbell CR10 data logger, etc.)

Please continue on to the next page

3. Third Stage: _____

- Approximately how many files or artifacts exist at this stage?

- What is the approximate average size of each file at this stage?

(Please include the unit of measurement – kb, MB, GB, etc.)

- What format(s) are the files or artifacts in?

(For example: MS Excel 2007, MySQL database, JPEG 2000 images, a raw data file from a Campbell CR10 data logger, etc.)

4. Fourth Stage: _____

- Approximately how many files or artifacts exist at this stage?

- What is the approximate average size of each file at this stage?

(Please include the unit of measurement – kb, MB, GB, etc.)

- What format(s) are the files or artifacts in?

(For example: MS Excel 2007, MySQL database, JPEG 2000 images, a raw data file from a Campbell CR10 data logger, etc.)

Please continue on to the next page

5. Fifth Stage: _____

- Approximately how many files or artifacts exist at this stage?

- What is the approximate average size of each file at this stage?

(Please include the unit of measurement – kb, MB, GB, etc.)

- What format(s) are the files or artifacts in?

(For example: MS Excel 2007, MySQL database, JPEG 2000 images, a raw data file from a Campbell CR10 data logger, etc.)

Please list any additional stages below or on the back of this sheet as needed

Module 3 – Sharing

1. In the previous module you identified the stages that your materials go through during their lifecycle.

In the table below, please indicate what materials you would be willing to share and with whom?(Please place a checkmark in as many boxes as apply)

	Would not share with anyone	Would share with my immediate collaborators	Would share with others in my research center or at my institution	Would share with others in my field	Would share with others outside of my field	Would share with anyone
Initial Stage						
Second Stage						
Third Stage						
Fourth Stage						
Fifth Stage						
Additional Stage(s) – (if needed)						

2. In the table above, if you indicated that you would be willing to share any of your materials with:

- others in your field,
- others outside of your field, or
- with anyone

then please indicate **when** you would be willing to share the data with each group:

(ex. immediately after the results are published, 6 months after the project is completed, etc.)

3. Who would you imagine would be interested in these materials?
(For example, other researchers in my field, researchers outside of my field, practicing professionals, policy makers, etc.)

4. How would you imagine these materials being used by the groups / people you listed in the previous question? What value would these materials have for these groups / people?

5. Would you place any conditions on sharing your materials with the groups or people you have identified (such as requiring some form of acknowledgement, etc.)?

If so, what would those conditions be?

Module 4 – Access

1. Have you ever deposited any of these materials into a repository?

Yes No I don't know

a. If you answered “yes” to this question, which materials or artifacts and to what particular repository?

2. Would you be willing to submit your materials to a repository?

Yes No I don't know

3. If you answered “yes” to question #2, please answer the following questions: (otherwise please leave these questions blank)

a. At what stage in the data's lifecycle would you submit your data to the repository?

4. Please prioritize your need for the following types of services for your materials.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability to cite these materials in my publications.					
A requirement that others cite these materials if they were to use it in their research.					
The ability to access these materials at a secondary (mirror) site if the repository is "off-line".					
The ability to restrict access to the materials to authorized individuals.					

Module 5 – Transfer of Materials / Ingest into a Resource Center

1. What preparations or actions (if any) would need to take place before your materials could be ingested into a resource center or otherwise transferred out of your direct control for curation purposes?

2. Please prioritize your need for the following types of services for your data.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability for me to be able to submit these materials to a repository myself. (I initiate and perform the submission process)					
The process of submitting these materials to a repository is automated. (The submission process is initiated through a trigger – a date, an event, etc., and done without my intervention)					
The ability to batch upload these materials into a repository.					

Module 6 – Organization and Description of Materials and Artifacts

1. Please explain briefly how these materials are organized, and how they have been described (e.g. "detailed annotations", "a code book", "a data dictionary", "column headings in a spreadsheet", etc.).

If you have used any standardized forms of description or metadata please identify the standard(s) in your response.

2. Is this amount of organization and description sufficient for another person with similar expertise to be able to understand and properly use the materials?

Yes No I don't know

3. Please prioritize your need for the following types of services for your data.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability to make the materials accessible in multiple formats.					
The ability to apply standardized metadata from your field or discipline to the materials.					

Module 7 – Discovery

1. Please prioritize your need for the following types of services for your materials.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability for researchers within my discipline to easily find these materials.					
The ability for researchers from outside of my discipline to easily find these materials.					
The ability of the general public to easily find these materials.					
The ability for people to easily discover this dataset using Internet search engines (e.g., Google).					

2. How do you imagine that people would find your data set?

Module 8 – Intellectual property

1. Who is the owner of the materials/artifacts?

2. Do any of your funding sources require that you: (please circle your response)

- Share your materials, artifacts, and data with others, publish your data, or deposit your data into a data repository?

Yes No I don't know

- Preserve your data beyond the life of the funding?

Yes No I don't know

3. Are these materials bound by any privacy or confidentiality concerns?

Yes No I don't know

- If “yes” please explain:

4. Do you have a preferred content license for your materials? (example; CC0; GNU)

5. Does your university have a required data use agreement or data transfer agreement for data sets?

Module 9 – Tools

1. What tools – software or hardware – are used in generating the materials?
 (e.g., “a data logger”, “a remote sensor”, etc. – please describe.)

2. What tools - software or hardware - are required to utilize the materials?
 (e.g., "Microsoft Excel 2003", “GIS”, "I wrote my own program”, etc. – please describe.)

3. Please prioritize your need for the following types of services for your materials.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability to connect the materials to visualization or analytical tools.					
The ability of others to comment on or annotate the materials.					

Module 10 – Linking / Interoperability

1. In the journals, or places you publish most often, are data, or other supplemental information, accepted for publication?

Yes No I don't know

- If “yes” please list the journal or place of publication:

2. Please prioritize your need for the following types of services for your materials.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability to connect your materials with publications or other outputs.					
The ability to support the use of web services APIs.					
The ability to connect or merge your data with other data sets.					

Module 11 – Measuring Impact

1. Please prioritize your need for the following types of services for your data.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability to see usage statistics on how many people have accessed this material.					
The ability to gather information about the people who have accessed or made use of these materials.					

2. Beyond usage statistics, are there any other measurements or analytics that you would like to apply to your materials?

Module 12 – Data Management

1. What are the primary ways that you currently manage your materials? Please include the storage media(s) and any tools used in your management of the materials:

2. Do you currently make back-up copies of your materials?

Yes No I don't know

- If you answered “yes” to this question, approximately how often do you make back-up copies?

3. Do you currently take any security measures to protect your materials?

Yes No I don't know

- If you answered “yes” to this question, what security measures have you taken?

4. Please prioritize your need for the following types of services for your materials.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or N/A
The ability to enable version control for these materials.					

Module 13 – Data Preservation

1. What are the most important parts of the materials or artifacts to preserve (manage and maintain over time)?

2. How long would your materials be useful or have value for you or others if it were to be preserved?

- My materials do not need to be preserved.
- Less than 3 years.
- 3 years or more but less than 5 years.
- 5 years or more but less than 10 years.
- 10 years or more but less than 20 years.
- 20 years or more but less than 50 years.
- 50 years or more but less than 100 years.
- Indefinitely.

3. If your materials were to be preserved and maintained for long term access, please prioritize your need for the following types of services.

	Not a priority	Low Priority	Medium Priority	High Priority	I Don't Know or NA
The ability to audit these materials to ensure its structural integrity over time.					
The ability to migrate materials into new formats over time.					
A secondary storage site for the materials.					
A secondary storage site for the materials at a different geographic location.					
Documentation of any and all changes that were made to the materials over time.					