Donor-driven Metadata as a Two-way Street

Using Donor Survey Tools for Both Description and Donor Education

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Background

Goal of expanding from University-only content to supporting manuscript collections.
Why have more paperwork?

- Pre-custodial approach
- Budget justification
- **Donor education**
- Rights management and documentation
- Resource analysis/troubleshooting
- Appraisal/basis for scoping
- Creator-supplied metadata
Donor-driven metadata

- **Self-identification** of significant properties
- **Context** not otherwise available
- **Process** description
- **Patterns** of usage and creation
- ...

[Image of a computer screen with a text box that reads: Type any name]
Targeting information requests

- Role-based survey forms
- Accessible language/usability concerns
- Limiting scope
(ideally)

Helps donors:
- Feel engaged in process
- Understand limitations
- Think about their content-creation strategies

Helps repositories:
- Build connections
- Temper expectations
- Learn about problem areas in advance
Archival Models


- Yale University Website Appraisal Checklist (2017)

- Tufts Submission-Agreement Builder Tool (2011)

- Paradigm Records Survey (2005)


- UCLA Digital Materials Survey (2016)
Next steps

- Expanding survey use and re-evaluating
  - Better differentiation between required/optional fields
  - Explanations visually separated from instructions
    More conditional questions

- Exploring options for automation
  - Web form
  - Scheduled reminders
  - Scheduled refreshes
Questions/Contact

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