**Evaluating a Potential Partner Archive: A Question Guide**

What happens when your collection goes to an institutional archive? Whether you plan to donate your items or collection to a large research university or a small community collection at your local City Hall, these questions can guide your evaluation of the institution’s services, facilities, and reliability before you agree to donate your materials. Use this checklist to support your informational interviews with potential partners.

*Archival Vocabulary:*

The terms “institution,” “organization,” and “archive” are used interchangeably to describe the archival entity you are evaluating for partnership. Similarly, “items,” “collection,” and “materials” are used interchangeably to refer to the items you wish to donate or lend to an archival entity.

**What are the main attributes of the FACILITY?**

* What is your potential partner institution’s *vision statement*?
* What is the *scope* of its collection?
* What are some of the unique *attributes of the staff*?
	+ Are there specific areas of the field where its staff has *expertise*?
	+ What kind of *training/education* do you expect staff to have?
	+ How does the organization reach out to *community members*?
* How do you know if the institution and its donors have a *shared vision*?
* What is the *location* of the facility?
* What are some of the *significant architectural features* of the building? Is there space for *storage/exhibition/administration/research*, etc.? *accessible parking*
* Is there *visitor* parking close to the building? Is it wheelchair accessible?
* Who utilizes the facility? What kind of *services* does it offer to the public?
* How is the *building maintained*? Are there specific *challenges or concerns* that need specific attention to sustain collections care?

**What is your ACQUISTION PROCESS?**

* What are your potential partner institution’s *guidelines for collecting* and *identifying new collections items*?
* How does it *appraise (meaning: evaluate for inclusion or exclusion) a collection/item*?
	+ How does it evaluate and document an *item/collection’s physical description and condition*?
	+ How does your potential partner determine if an item/collection fits the *scope* of its collection?
	+ What is its process for gathering *contextual information*?
* How does it determine the *research value* of the material?
* What is its policy for *returning items* that are not included?
* Does it prefer to collect only *original and unique materials*?
* What is its *digital surrogate policy*? (meaning: does it make digital copies of physical originals? What does it do with them?)

**How do you CATALOG ITEMS and create FINDING AIDS?**

* What is your potential partner institution’s *cataloguing methodology*?
* Can you find an example of its finding aids? Evaluate for *quality and inclusion of relevant details.* Finding aids are collection overviews that give researchers a sense of what they can expect to find or learn about within a specific collection.
	1. What criteria do you use to connect collections in the *“Related Collections”* section of each finding aid? (time period, topic, relatives, etc.)
* How long does it take to complete the *acquisition and cataloguing process*? When can you expect your item/collection to be available to the public?
* How does it *prioritize* new items/collections for processing?

**What is the LEGAL CONVEYANCE process? (meaning: the legal transfer of your collection from you to your partner institution)**

* What type of *consent or gift agreements* are required to have an item included in this archive?
* How does your potential partner institution *communicate with the donor* during the acquisition process? What should donors like you expect?
* How does it address *special requests*?
* How does this organization handle *restriction timelines* (meaning: time periods when the public is not allowed to view collections items)?

**How is CONSERVATION and PRESERVATION maintained?**

* What kind of *climate control* measures are in place?
* Do you have a *conservation/preservation* department?
* What are your preferred *storage methods*?
* What is your protocol for *handling items*?

**How is ACCESS provided?**

*Usage*

* + How often are collections items typically used by researchers?
	+ How does your potential partner institution facilitate *on-site use*? Will you and other community members be able to access your items on-site?
	+ How does it facilitate *online use*? Will you and other community members be able to access your items online?
		- Are digital items accessible to people with vision and hearing disabilities?
	+ How do you respond to *remote requests for on-site and off-site use*?

*Digitization*

* + Does the organization have a *digitization department*?
	+ What is the *timeline* for an item/collection to be digitized?
	+ What *types of items/collections* does this organization digitize?
	+ How does the organization *prioritize the digitization* of materials?
	+ How does the organization facilitate the *backing-up* of digital materials to prevent loss?

*Exhibitions*

* + Which staff members are involved in the *development* of exhibitions?
	+ Who is responsible for the *creation/curation* of exhibitions?
	+ How and where are exhibitions *installed*?
	+ How are exhibits *promoted/publicized*?
	+ How long do exhibits remain on display? How are they *maintained*?
	+ Does this organization facilitate feature exhibitions through its *website? Does it design digital exhibitions?*

*Educational access*

* + *How would researchers, faculty, and students* access this archive?
	+ What are some of the primary *guides and/or tools* that are used to facilitate educational access to the archive?
	+ Are there any *publications* in which this institution documents educational opportunities or events?

*Donor relations*

* + How does this organization *communicate* with collection donors (like you) after the acquisition process is complete?
	+ Are there any *benefits* for donors?
	+ Will donors receive priority for research assistance?
	+ How will donors be included in the *collection development* of their materials or related materials? (meaning: will you be called on to think about other historical materials that might complement yours in the archive and add to the story)?
	+ What resources does the institution provide to *assist/advise donors*?

 *Websites*

* + Does your potential partner institutional archive provide *resources to help donors and/or researchers with building or using websites*?
	+ What is the typical *process based on copyright considerations for sharing digital media* once it is a part of the institution’s collection?
	+ What kinds of *technical expertise* can this institution provide?
	+ What kinds of *creative expertise* can this institution provide?
	+ How much *time is allotted* for staff to work with donors?

**How is LONG-TERM SAFETY and STORAGE provided?**

* What kind of *back-up storage system* does this institution implement?
* What fire safety protocols are in place for this institution?
* What *flood safety protocols* are in place for this institution?
* What *pest infestation safety protocols* are in place at this institution?
* Does this institution/facility provide *dark storage*? (for storing items sensitive to light/heat)

**What is the process for collecting ORAL HISTORIES?**

* Is there an *oral historian on staff* to conduct workshops on and/or train others in oral history skills?
* What *formats* do oral historian staff members use? What formats does your potential partner institution recommend?
* What is the process for oral history *transcription and access*?
* How will a transcript be made *accessible? Hard-copy or online*?
* Will oral histories be *accessible online*?
* How do you identify/prioritize/invite oral history subjects?
	+ Do you partner with *social justice organizations*?
	+ Do you give priority to subjects with lived experience and knowledge of *local history*?

**What FUNDING is sustained to manage the archive in perpetuity?**

* What *endowments* help fund the archive?
* Does the library participate in *fundraising*? If so, how?
* Is there specific *funding for curated programs* as part of a long-term vision?
* Does your potential partner institution foresee an *expansion or contraction in archive funding*?
* How does it fund *acquisitions*? How do fluctuations in funding effect what it can acquire?
* How does it fund *overhead expenses*?
* Does it provide funding through *scholarships or other financial incentives* for students and/or community researchers?
* What role do *grants* play in the funding of your potential partner institution? Does it rely on grant funds to survive?

**Do you have COLLABORATIVE or CONSORTIA RELATIONSHIPS in the community or with other institutions/agencies/local groups?**

* Is there *regional and/or international collaboration to provide cataloguing access* i.e. Can other institutions access this the catalogue entries of this institution?
* Are archival collections searchable on *WorldCat*?
* Do you have agreements with other *educational institutions* to jointly steward donated collections items?