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## The Materials Curation Inventory Toolkit: Interviewer's Manual

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## Notes on the Interviewer's Manual

The Interviewer's Manual provides the framework for the interview. It contains text and questions to be read to the participating researcher over the course of the interview.

It is meant to be used in conjunction with the Interview Worksheet. The Interview Worksheet should be given to the interviewee to fill out over the course of the interview. Some of the questions you will ask will be in response to the answers given by the researcher in the Interview Worksheet.

To aid in the readability of this document during the interview the font has been enlarged.

*The instructions to the interviewer are colored in red and are in italics.*

The explanatory text that is meant to be read to the interviewee is in "quotes".

## Begin the Interview

*It is suggested that the interviewer read the following text to the interviewee as an introduction:*

“This interview is designed to elicit information about the deliverables and other materials created in the course of a particular research project that you have identified from your research (in the case of the current interview, the AGEP Alliance funded research), what you are currently doing to manage those materials and to identify and capture your needs in sharing, curating or preserving those materials. Based on the information you provide, a needs assessment for the preservation of those materials will be constructed. This interview will be recorded using the Zoom recording feature and then transcribed. Once the transcription has been created, the recording file will be deleted. Do I have your consent to record?”

During this interview, I will be asking you a series of questions to learn more about your materials and to identify areas of need pertaining to the handling and curation of these particular materials and artifacts. **For the purposes of this interview, materials and artifacts refer to all information produced in the course of the research project, including digital data, print information, streaming videos, audio recordings, and any other artifacts.**

Specifically, I will be asking you to complete the questions in the Interview Worksheet that I have given you, and then I will ask you several follow up questions about your responses to gather additional details and to better understand your priorities and needs.

This worksheet is divided into individual modules. Please fill out a module when I ask you to do so and then stop after you have completed the section. I will then ask you some additional questions before we proceed to the next module in the interview. In your responses to this worksheet and to the interview questions, please limit your focus to the particular materials from the research project that is our focus today.

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 me.

Do you have any questions for me at this time?”

## Background Question

*Ask the following question to the interviewee:*

Before I have you begin Module 1 of the worksheet, Please could you provide me with a brief overview of the research project associated with the materials that we will be discussing in this interview?

## Module 1 – The Materials

*Read the following text to the interviewee:*

"I would now like to have you fill in module 1 of the worksheet: please provide me with a brief description of the materials"

*Review what the Interviewee has written to be sure that you understand it. Ask for clarification and additional information as needed. The Interviewer may need to prompt with examples of possible material types.*

*Don't worry about getting all of the details at this point. More details will be gathered in the next modules.*

*Read the following text to the interviewee:*

*"Please describe the broad categories of materials that resulted from the research project that you described. Give me a rough estimate of the size or number of materials in each category that you have listed."*

*Review what the Interviewee has noted in the list, making sure to ask for clarification if any category or size notation is unclear.*

*Don't worry about getting all of the details at this point. More details will be gathered in the next modules.*

## Module 2 – The Lifecycle of the Data Set

*Please read the following text to the interviewee as an introduction to this module:*

“I would like you to walk me through the research project you just described from the point of view of the materials created throughout the project. In particular, I would like to know what happens to the data, documentation, and artifacts and how would you characterize those materials at each stage of the research process.

For instance, if we were to re-frame the research process as a series of stages consisting of activities around those materials, what would those activities be and how would you characterize them?

Some potential stages might include the creation of educational materials, the collection of data, generation of raw data, the processing or refinement of the data, the data analysis, the creation of policy documents, or the synthesis of information into policy documents.

Starting with the first stage, how would you characterize this stage and its associated activities?”

*Have the interviewee describe a stage first and then complete the corresponding information listed on the worksheet. Repeat this process for each stage.*

*For each stage mentioned be sure to gather the following information (if interviewee does not bring it up him/herself):*

- What happens to the materials in each stage?
- Why does this happen (what purpose does it serve)?
- How does it happen (what tools and instruments are used in particular)?
- Who is involved (lab techs, grad students, etc.)?

*(The Interviewee may bring up these issues him/herself but some follow up questions on these points may be needed.)*

## Module 3 – Sharing

*For question #1, read the following text to the interviewee:*

“I would like you to indicate what materials from the stages in your project lifecycle you would be willing to share and with whom by placing a checkmark in the appropriate boxes. Please check as many of the boxes as apply.”

*It may help to write down the “title” that the interviewee gave the data stage in “module 2 – the lifecycle of the data” in these boxes. For example, the interviewee may have written in “data normalization” for the Second Stage, so you may want to write “normalized” in the Second Stage cell in this table.*

*Once the interviewee has finished checking boxes, confirm your understanding of the data that the interviewee would be willing to share and with whom.*

*For question #2, once the interviewee has provided a response, ask the following question:*

- Do you currently share your materials with any one?
  - If “yes” then ask:
    - Who do you share your materials with?
    - How do you share your material?
    - Do you place any conditions on sharing your materials? (For example, do you ask that the recipient keep the materials confidential)?



*Once the interviewee has finished completing questions #3, 4, and 5 - discuss his or her responses, ask for more details if needed.*

*Before moving on to the next module, ask the following question:*

- What publications have resulted from these materials?  
Be sure to get the name of the journal(s) and approximately when the publication(s) appeared in the journal(s).

## Module 4 – Access

(Note: for the purposes of this interview, “repository” is broadly defined and may be institutional, discipline, regional, publisher, etc.)

*Have the interviewee answer questions #1, 2, and 3 on repositories on the worksheet. Then ask him/her the following questions:*

*If the Interviewee answered “yes” to Question #1 then ask:*

- What would make you decide to deposit your data into a project affiliated resource center?

*If the Interviewee answered “yes” to Question #2 then ask:*

- Are there any services in particular that you would want the resource center to provide?

*If the Interviewee answered “no” to Question #2 then ask:*

- What concerns do you have about submitting your materials to a public repository?

Question #3a refers to the stages in the Data Lifecycle that the researcher identified in Module 2 – The Lifecycle of the Data Set

*If the Interviewee provided an answer to Question #3b then ask:*

- Could you tell me what time frame would be reasonable for you to deposit your materials in a resource center?

*Have the interviewee answer question #4 on priorities for repositories on the worksheet. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

## Module 5 - Transfer of Data / Ingest into a Repository

*Once the interviewee has finished completing question #1, discuss his or her responses. If the researcher needs some prompting, give him or her some examples of actions that might need to be taken before the data could/should be ingested or transferred. These examples might include:*

- *a need to take inventory*
- *a need to review the materials to check for errors or ensure quality*
- *a need to ensure a materials are intact*
- *a need to “scrub” the data to modify or remove any variables or information that could be used to identify human subjects.*
- *a need to ensure compliance with funding agency protocols or IRB requirements*
- *a need to obtain sign off from stakeholders*
- *a need to gather and/or review relevant documentation and materials that support the use, curation, etc. of the data*
- *a need to create finding aides for print documents*

*Once the interviewee has finished completing this question, discuss his or her response. Be sure that you understand the response(s) before moving on to the next question.*

*Have the interviewee answer question #2 on priorities for ingest into a repository on the worksheet. Then ask the interviewee to talk a little about his/her responses:*

- *What makes these services a (low/med/high, etc.) priority for you?*

## Module 6 – Organization and Description of Data

*Have the interviewee answer questions 1 and 2 on the worksheet about how the materials are organized. Review what the Interviewee has written for question 1 to be sure that you understand it. Ask for clarification and additional information as needed.*

*Then ask him/her the following questions:*

If the Interviewee answered “no” to Question #2 then ask:

- What additional description or organization would be needed for someone else with similar expertise to understand and use your materials?
- Is there any additional contextual information or documentation would be required for others to understand and make use of your materials?

*Have the interviewee answer question #3 on priorities for organization and description of the data set. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

## Module 7 – Discovery

*Have the interviewee answer questions about priorities for the discovery of the materials on the worksheet. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

*Review what the Interviewee has written for question 2 to be sure that you understand it. Ask for clarification and additional information as needed.*

*You may want to suggest some additional possible means of discovery if the researcher needs prompting: through a citation in a publication, library catalog, blog / RSS feed, etc.*

## Module 8 – Intellectual Property

*Have the interviewee answer questions about intellectual property issues pertaining to the materials on the worksheet.*

*After reviewing the interviewee's answers for Questions #1, ask the following question:*

Are there any other stakeholders associated with these materials?

Stakeholder can be defined as: any groups, organizations, individuals or others that you see as having made an investment in the material or that you would feel the need to consult regarding the material's release and use.

*Review the interviewee's answers for Questions #2 & #3:*

- *If the interviewee responded "yes" to any of parts of Question #2, then ask the following:*
  - Could you provide me with the details of the requirements made by the funding agency?
  
- *If the interviewee responded "yes" to Question #3, then be sure that the privacy or confidentiality concerns are explained well enough for you to understand them. Also ask the following:*
  - How might these concerns associated with your materials be addressed?

*Review the interviewee's answers for Questions #4 & #5. Ask clarifying questions to make certain that you understand their answers given.*

## Module 9 – Tools

*Have the interviewee answer question #1 on the worksheet and then discuss it with him or her. Ask the following questions, if they are not addressed by the researcher:*

- How is this tool used in working with the materials?
- Would this tool be needed for others to make use of your materials?*If the answer to this question is “yes”, then ask the following:*
  - Are there alternative tools available that could be used instead?

*Have the interviewee answer question 2 on the worksheet relating to priorities on tools. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

## Module 10 – Linking / Interoperability

*For question #1:*

- If the interviewee responded “yes” to Question #1 on the worksheet, then ask the following question:
  - How do you prepare your materials for submission to the journal or place of publication?

*Have the interviewee answer question 2 on the worksheet relating to priorities on services relating to interoperability. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?



## Module 11 – Measuring Impact

*Have the interviewee answer question 1 on the worksheet relating to priorities on services relating to measuring impact. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

*If the interviewee assigns a high or a medium priority to “The ability to gather information about the people who have accessed or made use of these materials”, then ask the following question:*

- What kind of information about the people who are accessing or using your materials would you like to be able to collect?

*Have the interviewee answer question #2 on the worksheet and then discuss it with him or her. Be sure that the interviewee explains his/her needs well enough for you to understand them.*

## Module 12 – Data Management

*After the interviewee answers question #2 on the worksheet, ask him/her the following question:*

- If you were to submit your materials to a resource center, how often would you want your materials to be backed-up?

*After the interviewee answers question #3 on the worksheet, ask him/her the following question:*

- If you were to submit your materials to a resource center or transfer it to us, what security measures would you want enacted to protect your materials? (Possible examples include password protection or two factor authentication)

*Have the interviewee answer question 4 on the worksheet relating to priorities on services relating to data management. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

## Module 13 – Data Preservation

*Have the interviewee answer question 1 on the worksheet. Then ask the interviewee to talk a little about his/her response.*

*Be sure that you understand the interviewee's response before continuing on to the next question. You may want to ask some follow up questions for clarification purposes such as:*

- Which of the materials that you created should be preserved?
- Are the materials that you are willing to share with others, the materials that needs to be preserved? Are there additional parts or components of the materials that need to be preserved beyond the materials that you are willing to share?

*Have the interviewee answer question 2 on the worksheet relating to the length of time the materials should be preserved. Then ask the interviewee to talk a little about his/her response:*

- Why did you select this length of time?

*Have the interviewee answer question 3 on the worksheet relating to priorities on services relating to preservation. Then ask the interviewee to talk a little about his/her responses:*

- What makes these services a (low/med/high, etc.) priority for you?

## **Collecting Data Samples and/or Additional Sources of Information**

- Ask the interviewee if you could have a sample of the materials.
- Ask the interviewee if there are any relevant documents or publications that would help you better understand the materials that he/she would be willing to share with you.

**END OF INTERVIEW – THANK THE INTERVIEWEE FOR THEIR TIME**