Supporting Software Preservation Services in Research and Memory Organizations - Interview Guides

## Service provider interview guide #1: for subjects currently providing software curation services

**I. Interviewer Version (with follow-up questions)**

*Part One: Motivations, 4-5 questions + follow-ups, est 25 min*

If you remember, how did you hear about the SPN Service Provider Survey?

(Confirm types of software preserved at the subject’s institution, Q5-7) Can you tell me more about the kinds of software and software-related materials you have in your collections?

Follow-ups: What does/did the software do? Why did your institution acquire it? Where do you store it currently?

(Confirm whether researchers have requested access to software, Q13) If you have received requests from researchers to access and/or use software in your collections, how did you hear about them and what did the requesters want to do?

(Confirm motivations/use cases mentioned in the survey, Q8) Can you tell me more about why preserving software is relevant to your institution’s mission or goals?

Follow-ups: Who are the people most likely to be interested in the software you’re preserving, and why would they be interested in having access to it?

Follow-up, for those with compliance responsibilities: Tell me about the regulations or compliance issues that affect your approach to software preservation.

What information do you use to advocate for software preservation resources?

What are the biggest challenges you face in preserving software at your institution?

Follow-ups: What information or resources (a community forum, workshops, expertise, needs assessments, data, equipment, etc.) do you use to address these challenges?

*Part Two: Practices, Policies, and Resources, 7+ questions, est. 25 min?*

(Confirm staffing levels for software preservation services indicated in the survey, Q14, or apparent from institutional website). Who are the primary people responsible for software curation and preservation at your institution and what do they do? What other responsibilities does each have apart from software preservation?

Follow-ups: How long have these positions been established at your institutions? About how long has each person on the team been in their current role?

(Confirm types of workflows mentioned/shared in the survey, Q9-10). How did you craft your workflows for software collecting, curation, preservation, and access?

Follow-ups: How long have they been established? Why did you choose to design your workflow in this way? What systems and standards do you use in the course of this work (e.g. accessioning, metadata, ingest, preservation, dissemination, discovery, etc.)? How do you document them? How often are they re-assessed and amended? What services or platforms do you use (emulation or repository services, version control tools, etc.)?

(Confirm types of policies mentioned/shared in the survey, Q11-12). Can you tell me more about your policies for software collecting, curation, and preservation (e.g. policies such as collection development policy, language in deeds of gift, etc.)?

Follow-ups: How do you document these policies and agreements? How widely do you share or publicize them? How long have they been established? How often are they re-assessed and amended?

What types of agreements for use and access do you provide?

What contextual documentation or other information (software installation manuals, etc.) would you have in an ideal world to preserve the software in your collections?

(Confirm resources mentioned in survey, Q15): Are there any other sorts of institutional resources (e.g. people, departments, servers, institutional grants) that you use for software curation and preservation activities?

Are there any resources beyond your institution that you use for software curation and preservation activities?

*Part Three: Skills and Professional Development, 3-5 questions + follow-ups, est. 10 min?*

(Confirm skills mentioned in survey, Q20). Why did you pick [insert survey question response] as most important for collecting, preserving, curating, and providing access to software?

Follow-ups: Are there other skills you think are important to collect, preserve, curate, and provide access to software? If you were advising a new professional interested in software preservation, where would you tell them to go to develop these skills?

(Confirm hopes for SPN, Q21). What professional development opportunities, documentation, or other resources could SPN provide to help you meet your goals for software curation and preservation?

(Confirm subject’s questions about software preservation, if any, Q22) What (other) questions do you have about software preservation that you’d like to explore or learn more about?

*Part Four: Wrapping Up, 1 question, est. 3 min*

Is there anything that I should have asked you today that we have not yet discussed?

[Before finally concluding, the interviewer should verify any details in the notes that weren’t clear and thank the subject for volunteering the time to the study, reminding them of the group’s plans for the interview data as needed.]

**II. Version to share with subjects**

*Part One: Motivations*

If you remember, how did you hear about the SPN Service Provider Survey?

Can you tell me more about the kinds of software and software-related materials you have in your collections?

If you have received requests from researchers to access and/or use software in your collections, how did you hear about them and what did the requesters want to do?

Can you tell me more about why preserving software is relevant to your institution’s mission and/or goals?

What are the biggest challenges you face in preserving software at your institution?

Follow-ups: What information or resources (a community forum, workshops, expertise, needs assessments, data, equipment, etc.) would you use to address these challenges?

*Part Two: Practices, Policies, and Resources*

Who are the primary people responsible for software curation and preservation at your institution and what do they do? What other responsibilities does each have apart from software preservation?

How did you craft your workflows for software collecting, curation, preservation, and access?

Can you tell me more about your policies for software collecting, curation, and preservation (e.g. policies such as collection development policy, language in deeds of gift, etc.)?

What types of agreements for use and access do you provide?

What contextual documentation or other information (software installation manuals, etc.) would you have in an ideal world to preserve the software in your collections?

Are there any other sorts of institutional resources (e.g. people, departments, servers, institutional grants) that you use for software curation and preservation activities?

Are there any resources beyond your institution that you use for software curation and preservation activities?

*Part Three: Skills and Professional Development, 3-5 questions + follow-ups, est. 10 min?*

Which skills are most important for collecting, preserving, curating, and providing access to software?

What professional development opportunities, documentation, or other resources could SPN provide to help you meet your goals for software curation and preservation?

What (other) questions do you have about software preservation that you’d like to explore or learn more about?

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## Service provider interview guide #2: for subjects not currently providing software curation services)

**Interviewer Version (with follow-up questions)**

*Part One: Motivations, 4-5 questions + follow-ups, est 25 min*

If you remember, how did you hear about the SPN Service Provider Survey?

(Confirm types of software or software-related materials mentioned in the survey, if any, Q5-7) Can you tell me more about the kinds of software and software-related materials you have in your collections?

Follow-ups: What does/did the software do? Why did your institution acquire it? Where do you store it currently?

(Confirm whether researchers have requested access to software, Q13) If you have received requests from researchers to access and/or use software in your collections, how did you hear about them and what did the requesters want to do?

(Confirm motivations/use cases mentioned in the survey, Q16-17) Can you tell me more about why preserving software is relevant to your institution’s mission or goals?

Follow-ups: Who are the people most likely to be interested in using software in your collections? Who are the people most likely to need access to software preservation services provided by your institution in the future?

Follow-up, for those who might expect to have compliance responsibilities: Tell me about the regulations or compliance issues that might affect your approach to software preservation in the future.

What contextual documentation or other information (software installation manuals, etc.) would you like to have in order to preserve the software in your collections?

What are the biggest challenges you face in getting started with preserving software at your institution?

Follow-up: What information or resources (a community forum, workshops, expertise, needs assessments, data, equipment, etc.) would you use to address these challenges?

*Part Two: Skills and Professional Development, 3-5 questions + follow-ups, est. 10 min?*

(Confirm skills mentioned in survey, Q20). Why did you pick [insert survey question response] as most important for collecting, preserving, curating, and providing access to software?

Follow-ups: Are there other skills you think are important to collect, preserve, curate, and provide access to software? If you were advising a new professional interested in software preservation, where would you tell them to go to develop these skills?

(Confirm hopes for SPN, Q21). What professional development opportunities, documentation, or other resources could SPN provide to help you meet your goals for software curation and preservation?

(Confirm subject’s questions about software preservation, if any, Q22) What (other) questions do you have about software preservation that you’d like to explore or learn more about?

*Part Three: Wrapping Up, 1 question, est. 3 min*

Is there anything that I should have asked you today that we have not yet discussed?

[Before finally concluding, interviewer should verify any details in the notes that weren’t clear and thank the subject for volunteering the time to the study, reminding them of the group’s plans for the interview data as needed.]

**II. Version to share with subjects**

*Part One: Motivations, 4-5 questions + follow-ups, est 25 min*

If you remember, how did you hear about the SPN Service Provider Survey?

Can you tell me about the kinds of software and software-related materials you have in your collections?

If you have received requests from researchers to access and/or use software in your collections, how did you hear about them and what did the requesters want to do?

Can you tell me about why preserving software is relevant to your institution’s mission or goals?

What contextual documentation or other information (software installation manuals, etc.) would you like to have in order to preserve the software in your collections?

What are the biggest challenges you face in getting started with preserving software at your institution?

*Part Two: Skills and Professional Development, 3-5 questions + follow-ups, est. 10 min?*

What skills are most important for collecting, preserving, curating, and providing access to software?

What professional development opportunities, documentation, or other resources could SPN provide to help you meet your goals for software curation and preservation?

What questions do you have about software preservation that you’d like to explore or learn more about?

What information would you use and/or like to have to advocate for resources to engage in software curation and preservation?

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## Service provider interview guide #3: for subjects who do not intend to provide software curation services)

**Interviewer Version (with follow-up questions)**

*Part One: Motivations, 4-5 questions + follow-ups, est 25 min*

If you remember, how did you hear about the SPN Service Provider Survey?

(Confirm types of software or software-related materials mentioned in the survey, if any, Q5-7) Can you tell me a bit about the nature of your collections and how software preservation relates to those collections, if at all?

Follow-ups: How and why did your institution acquire your software and software-related materials? Where do you store these materials currently? Who shares responsibility for caring for them? Do you anticipate acquiring (more/any) software and software-related materials in the future?

(Confirm whether researchers have requested access to software, Q13) If you have received requests from researchers to access and/or use software in your collections, how did you hear about them and what did the requesters want to do?

If a person came to your institution requesting access to software or software-related materials, where would you tell them to go for help?

(Confirm ranking of reasons for not planning to engage in software preservation, Q19) Can you tell me more about why you don’t anticipate providing software preservation in the future?

Follow-up: If some of the biggest barriers were removed, do you think there would be interest in the development of software preservation services at your institution?

*Part Two: Skills and Professional Development, 3-5 questions + follow-ups, est. 10 min?*

(Confirm skills mentioned in survey, Q20). Which of these skills are most important for collecting, preserving, curating, and providing access to software?

Follow-up: Are there other skills you think are important to collect, preserve, curate, and provide access to software? If you were advising a new professional interested in software preservation, where would you tell them to go to develop these skills?

(Confirm hopes for SPN, Q21). What professional development opportunities, documentation, or other resources could SPN provide to advance software curation and preservation?

(Confirm subject’s questions about software preservation, if any, Q22) What (other) questions do you have about software preservation that you’d like to explore or learn more about?

*Part Three: Wrapping Up, 1 question, est. 3 min*

Is there anything that I should have asked you today that we have not yet discussed?

[Before finally concluding, interviewer should verify any details in the notes that weren’t clear and thank the subject for volunteering the time to the study, reminding them of the group’s plans for the interview data as needed.]

**Version to share with subjects**

*Part One: Motivations, 4-5 questions + follow-ups, est 25 min*

If you remember, how did you hear about the SPN Service Provider Survey?

Can you tell me a bit about the nature of your collections and how software preservation relates to those collections, if at all?

If you have received requests from researchers to access and/or use software in your collections, how did you hear about them and what did the requesters want to do?

If a person came to your institution requesting access to software or software-related materials, where would you tell them to go for help?

Can you tell me more about why you don’t anticipate providing software preservation in the future?

*Part Two: Skills and Professional Development, 3-5 questions + follow-ups, est. 10 min?*

Which skills are most important for collecting, preserving, curating, and providing access to software?

What professional development opportunities, documentation, or other resources could SPN provide to advance software curation and preservation?

What (other) questions do you have about software preservation that you’d like to explore or learn more about?