# Appendixes

# Appendix A: Pre-Interview Survey and Interview Guide for Fellows

### Pre-Interview Survey

**Welcome and Introduction**

In 2018, CLIR received funding from The Andrew W. Mellon Foundation to evaluate the CLIR/DLF Postdoctoral Fellowships in Data Curation for the Humanities. CLIR has contracted with independent consultants, Liz Bishoff of The Bishoff Group and Tom Clareson of Lyrasis, to lead the evaluation. They have designed this pre-interview survey to help prepare a series of phone interviews with postdoctoral fellows.

This survey will collect information about:

* the types of research data curated during your fellowship;
* the data curation and other data-related activities performed during your fellowship;
* the training and other professional development support you received;
* communication with your supervisor, other fellows, and CLIR; and
* recommendations to CLIR regarding future postdoctoral fellowship programs.

Your responses will not be viewed by anyone except the consultants, who will aggregate information prior to sharing with the CLIR to assure anonymity. Liz will conduct phone interviews with the fellows.

The survey will take approximately 15-20 minutes to complete. You may enter and exit the survey at any time. There is an icon in the upper-right-hand corner of the screen that you can use to exit the survey. To exit/re-enter the survey, you will need to enable cookies on your browser, as this is the way Survey Monkey tracks the respondent. Additionally, you will need to use the same browser and device in order to complete the survey.

Sincerely,

Christa Williford

Director, Research and Assessment

**Demographic Information**

\* 1. Demographic Information [TEXT BOXES FOR EACH]

Fellow's Name:

Host Institution Name:

Library/Department Name

Email Address:

Phone No.:

**Data Collections and the Fellowship**

This section of the survey will collect information regarding the data types that you curated during your fellowship as well as the source of that data.

2. What types of research data did you curate during your fellowship? Select all that apply.

* Library collection or item-level data, such as finding aids, catalog records, or other metadata that support search and discovery. Accession records, usage data, data about teaching/learning activities.
* Encoded versions of primary source text.
* Analog audio or audio-visual recordings that were digitized.
* Born-digital audio or audio-visual records.
* Other born-digital files, such as text or images.
* 2-dimensional or 3-dimensional works of art that were digitized, excluding manuscripts.
* Photos, including negatives, that were digitized.
* Books, manuscripts, and other textual materials that were digitized.
* Geospatial data.
* Numeric data sets.
* Software programs, operating systems, etc.
* I did not curate any types of data.

Discuss other types of research data that you curated.

[TEXT BOX HERE]

3. What was the source of the research data that you curated? Select all that apply.

* Data from legacy digital projects.
* Research data from researchers at my host institution.
* Research data from researchers at other institutions.
* Research data that was part of my personal collection.
* Research data from a research group that I was a member of.

Discuss other sources of the research data.

[TEXT BOX HERE]

**Data Curation Activities in the Fellowship**

The following questions pertain to your work in the area of data curation. For the purpose of this assessment, we draw a distinction between data curation work as "the active and ongoing management of data through its life cycle" (Question 4) and other data-related work, such as conducting outreach, promotion, assessment, instruction, or policy development related to data infrastructures or services (Question 5).

4. Indicate which of the following data curation activities you performed during your fellowship. Select all that apply.

* Created cataloging records, finding aids or other search/discovery tools.
* Created a website to support use of data collections.
* Data analysis.
* Data appraisal.
* Data gathering.
* Data harvesting.
* Data migration.
* Digital preservation implementation, such as ingesting collections to preservation systems.
* Digital preservation planning.
* Digitization/reformatting
* Documentation of data curation workflows/procedures.
* Metadata creation.
* Metadata enhancement.
* Mark-up, such as text encoding.
* I did not undertake any data curation activities.

Discuss other data curation activities you performed during your fellowship.

[TEXT BOX HERE]

5. Indicate which of the following data-related activities you performed during your fellowship. Select all that apply.

* Drafted institutional policies related to data infrastructures/services.
* Drafted an institutional data management plan.
* Provided data management consultations, such as creating data management plans for digital projects.
* Taught course/workshop on data management and/or use.
* Conducted an assessment of data management practices of a specific researcher, team or department.
* Developed a website related to data collections or services.
* Developed a promotional/outreach program related to the data collections and/or services.
* I did not perform any data-related activities.

Discuss other data-related activities you undertook during your fellowship.

[TEXT BOX HERE]

**Data Curation Experience and Skills**

The following questions will gather information about the skills you brought to your fellowship, as well as the skills your fellowship enabled you to develop.

6. Indicate your length of experience with the following skills *prior* to your fellowship.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **None at all** | **Less than 6 months** | **6-12 months** | **1-2 years** | **3+ years** |
| Text mark-up. |  |  |  |  |  |
| MARC record cataloging. |  |  |  |  |  |
| Metadata creation. |  |  |  |  |  |
| Digitization/reformatting original content. |  |  |  |  |  |
| Metadata harvesting using OAI-PMH. |  |  |  |  |  |
| GIS |  |  |  |  |  |
| Database design. |  |  |  |  |  |
| Coding. |  |  |  |  |  |
| Version control using GitHub or similar service. |  |  |  |  |  |
| Web programming. |  |  |  |  |  |
| Web design. |  |  |  |  |  |
| Basic data management (organizing digital files.) |  |  |  |  |  |
| Basic digital preservation (creating checksums, etc.) |  |  |  |  |  |

List other technical skills and length of experience *prior* to your fellowship.

[TEXT BOX HERE]

7. Indicate the level of learning or improvement on the following technical skills *during* your fellowship.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **I never learned this skill.** | **I have some skill but did not improve.** | **I developed skills, but not enough to work independently.** | **I developed skills to work independently with reference to instructions.** | **I am comfortable teaching these skills to others.** |
| Text mark-up. |  |  |  |  |  |
| MARC record cataloging. |  |  |  |  |  |
| Metadata creation. |  |  |  |  |  |
| Digitization/reformatting original content. |  |  |  |  |  |
| Metadata harvesting using OAI-PMH. |  |  |  |  |  |
| GIS |  |  |  |  |  |
| Database design. |  |  |  |  |  |
| Coding. |  |  |  |  |  |
| Version control using GitHub or similar service. |  |  |  |  |  |
| Web programming. |  |  |  |  |  |
| Web design. |  |  |  |  |  |
| Basic data management (organizing digital files.) |  |  |  |  |  |
| Basic digital preservation (creating checksums, etc.) |  |  |  |  |  |

List other relevant technical skills and the level of learning or improvement during your fellowship.

[TEXT BOX HERE]

8. Indicate your length of experience with the following non-technical skills prior to your fellowship

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **None at all** | **1-3 months** | **3-6 months** | **6-12 months** | **1+ years** |
| Project management. |  |  |  |  |  |
| Planning and leading meetings. |  |  |  |  |  |
| Writing for audiences outside my discipline. |  |  |  |  |  |
| Giving lectures for non-academic audiences. |  |  |  |  |  |
| Creating exhibits. |  |  |  |  |  |
| Teaching workshops/webinars. |  |  |  |  |  |
| Database design. |  |  |  |  |  |
| Writing grant applications. |  |  |  |  |  |
| Developing institutional policies. |  |  |  |  |  |
| Job seeking. |  |  |  |  |  |

List other relevant non-technical skills and the length of experience *prior* to your fellowship.

[TEXT BOX HERE]

9. Indicate your level of learning or improvement on the following non-technical skills *during* your fellowship.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **I never learned this skill.** | **I have some skill but did not improve.** | **I developed skills, but not enough to work independently.** | **I developed skills to work independently with reference to instructions.** | **I am comfortable teaching these skills to others.** |
| Project management. |  |  |  |  |  |
| Planning and leading meetings. |  |  |  |  |  |
| Writing for audiences outside my discipline. |  |  |  |  |  |
| Giving lectures for non-academic audiences. |  |  |  |  |  |
| Creating exhibits. |  |  |  |  |  |
| Teaching workshops/webinars. |  |  |  |  |  |
| Database design. |  |  |  |  |  |
| Writing grant applications. |  |  |  |  |  |
| Developing institutional policies. |  |  |  |  |  |
| Job seeking. |  |  |  |  |  |

List other relevant non-technical skills and the level of understanding knowledge gained during your fellowship.

[TEXT BOX HERE]

10. What skills do you wish you had learned during your fellowship that you did not?

[TEXT BOX HERE]

**Communication**

These questions relate to the communication between CLIR and the fellow, as well as the fellow, the host institution, and the fellow's cohort. Please share how communication may have changed or been impacted by COVID-19.

11. On average how frequently did you meet with your host institution supervisor(s) during the course of your fellowship? Select only one answer.

* Weekly.
* Bi-weekly.
* Monthly.
* As needed.
* When I set up an appointment.
* When my supervisor(s) set up an appointment.
* I don't remember.

Add any comments regarding frequency of communication.

[TEXT BOX HERE]

12. Please indicate your level of agreement with the following statements regarding communication.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Strongly disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly agree** | **I don’t know** | **N/A** |
| Communication with CLIR about the program was timely. |  |  |  |  |  |  |  |
| CLIR provided information that allowed me to make effective decisions. |  |  |  |  |  |  |  |
| Information from CLIR allowed for timely decision making. |  |  |  |  |  |  |  |
| Communication with my supervisor(s) supported the project’s success. |  |  |  |  |  |  |  |
| Communication with my supervisor(s) allowed for timely decision making. |  |  |  |  |  |  |  |
| Communication with my supervisor(s) allowed me to make progress on the project. |  |  |  |  |  |  |  |
| Communication with my supervisor(s) allowed problems to be addressed in a timely manner. |  |  |  |  |  |  |  |
| During COVID-19 I believe my supervisor and I developed effective means of communication. |  |  |  |  |  |  |  |
| A plan for communication with my supervisor was established early in my tenure. |  |  |  |  |  |  |  |

Please share any comments regarding communication.

[TEXT BOX HERE]

13. Indicate your level of agreement with the following statements regarding communication with other fellows in your cohort.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Strongly disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly agree** | **I don’t know** | **N/A** |
| Communication with my cohort supported my data curation activities. |  |  |  |  |  |  |  |
| Communication with my cohort advanced my research goals. |  |  |  |  |  |  |  |
| My cohort shared information related to the CLIR program that I didn't get anywhere else. |  |  |  |  |  |  |  |
| My cohort shared career information that supported my fellowship. |  |  |  |  |  |  |  |
| My cohort shared information that helped me solve data curation challenges. |  |  |  |  |  |  |  |
| During COVID-19 I communicated more with my cohort. |  |  |  |  |  |  |  |

Share any comments regarding communication with fellows in your cohort.

[TEXT BOX HERE]

**Conclusion and thank you**

14. What do you consider the most important outcome of your fellowship? Rank your responses from most important to least important with "1" being the most important and "12" being the least important.

* The curation of one or more important collections.
* The completion of the activities defined in the fellowship proposal.
* The collaboration with one or more scholars on the defined project.
* The networking with other CLIR fellows in my cohort.
* The learning of data curation skills so I can apply them in the future.
* The ability to continue to work on my research.
* The building of my résumé, adding data curation skills and knowledge.
* The ability to meet other scholars in my field.
* The sharing with others the importance of data curation.
* The advancing of the library's role in data curation.
* The expansion of my knowledge of the library's role in data curation.
* I got a job doing data curation.

15. What was the biggest impact of COVID-19 on your fellowship experience?

[TEXT BOX HERE]

16. Would you recommend that other recent PhDs submit an application to become a CLIR postdoctoral fellow?

* Yes
* No
* Maybe

If you responded 'No' or 'Maybe', comment on what factors might make you more likely to recommend the fellowship to others.

[TEXT BOX HERE]

17. What advice would you give CLIR regarding the development of future CLIR postdoctoral fellows and fellowships?

[TEXT BOX HERE]

### Interview Guide

#### Introductory information

* Evaluator Introduction
* Background information: Brief review of the purpose of the interview
* Objectives:
  + Identify data curation challenges that emerged during the data curation fellowship and how these challenges were addressed.
  + Identify what fellows learned about curation.
  + Gather information on the impact of the pandemic on the fellowship experience.
  + Gather information on the impact of the pandemic on data curation efforts.
  + Gather information on the impact of recent social justice movements on data curation.
  + Obtain information regarding collaborative efforts on data curation.
  + Obtain information regarding benefits of data curation to organizations participating in the CLIR Postdoctoral Fellowship program.
  + Obtain input regarding changes in the program that can be incorporated into future CLIR Postdoctoral Fellowships.

#### Interview Questions

* Did your goals or project change over the period of your fellowship? What was your role in changing the project? What was the overall impact on your fellowship of this change?
* What were the major successes or milestones you reached during your fellowship? If appropriate, describe how you realized them during the pandemic.
* What, if any, were the major data curation challenges or barriers that you encountered during your fellowship? How were they addressed by your host organization, your supervisor and/or CLIR?
* What were the major non-data-curation challenges you faced during your fellowship, and how were they addressed?
  + Did COVID-19 present challenges to you accomplishing the project goals and/or activities? How did you address these challenges?
* Do you believe your host institution’s approach to data curation changed because of your fellowship?
* How did your fellowship inform data curation at your institution?
* During your fellowship time, the world experienced a global pandemic and increased global attention to movements for social justice.
  + Did your organization make, or attempt to make, any changes in priorities or practices in order to address any issues related to social justice? If so what were they, and how were you involved?
  + How have these major environmental changes impacted data curation priorities or practices?
  + What, if any, changes has your organization undertaken as a result of the pandemic and contemporary social justice movements?
* What organizations or departments on campus did you collaborate with during the fellowship? What organizations or departments might be future collaborators? Please share any insights into these collaborative activities as they relate to the success of your project/s or your fellowship.
* As a fellow, you may have been considered “contingent” staff by your host organization (e.g. fixed-term, term-limited, temporary, etc.).
  + If this was the case, what issues did you encounter? Did these issues impact your ability to meet the fellowship’s goals and activities?
  + What would you recommend to your host organization and CLIR to address the impact of being contingent staff?
* What do you believe were the primary benefits of the fellowship to you?
* Several of the fellows accepted extensions increasing the fellowship from two to four years. Share with us the benefits of this extension, including examples of what you have accomplished that you wouldn’t have accomplished in the two-year fellowship.
* What recommendations do you have for CLIR for future postdoctoral fellows and fellowships?
* Please share any additional comments regarding your fellowship that you haven’t already shared.

**Data Curation definition:**[The University of Illinois’ Graduate School of Library and Information Science](http://www.lis.illinois.edu/) defines data curation as “the active and ongoing management of data through its life cycle of interest and usefulness.” This life cycle comprises steps of conceptualizing, creating, accessing, using, appraising, selecting, disposing, ingesting, reappraising, storing, reusing, and transforming data. During [this process](http://www.techrepublic.com/article/data-curation-takes-the-value-of-big-data-to-a-new-level/), data might be annotated, tagged, presented, and published for various purposes. Data curation means active management of data, reducing threats to their long-term value and mitigating digital obsolescence.

The privacy and autonomy of source communities and the proprietary nature of many data are key considerations in enacting data curation strategies.

# Appendix B: Pre-Interview Survey and Interview Guide for Supervisors

### Pre-Interview Survey

**Welcome and Introduction**

In 2018, CLIR received funding from The Andrew W. Mellon Foundation to evaluate the CLIR/DLF Postdoctoral Fellowships in Data Curation for the Humanities. CLIR has contracted with independent consultants, Liz Bishoff of The Bishoff Group and Tom Clareson of Lyrasis, to lead the evaluation. They have designed this pre-interview survey to help prepare a series of phone interviews with representative hosts of the fellows in data curation for Latin American and Caribbean studies and in data curation for African American and African studies.

This survey will collect information about:

* the types of research data that the fellows curated;
* the data curation and other data-related activities they performed;
* the training and other professional development support they required, communication with the fellow and with CLIR; and
* recommendations for future hosts.

The results of the survey will not be viewed by anyone except the consultants, who will aggregate information prior to sharing with the CLIR to assure anonymity. Tom will conduct phone interviews with the supervisors.

The survey will take approximately 15-20 minutes to complete. You may enter and exit the survey at any time. There is an icon in the upper-right-hand corner of the screen to allow you to exit the survey. To exit/re-enter the survey, you will need to enable cookies on your browser, as this is the way Survey Monkey tracks the respondent. Additionally, you will need to use the same browser and the same device in order to complete the survey.

Sincerely,

Christa Williford

Director, Research and Assessment

**Demographic Information**

\* 1. Demographic Information [TEXT BOXES FOR EACH]

Supervisor Name:

Host Institution Name:

Library/Department Name:

Email Address:

Phone No.:

**Data Collections and the Fellowship**

This section of the survey will collect information regarding the data types that the fellow curated as well as the source of that data.

2. What types of research data were curated by the fellow? Select all that apply.

* Library collection or item-level data, such as finding aids, catalog records, or other metadata that support search and discovery. Accession records, usage data, data about teaching/learning activities.
* Encoded versions of primary source text.
* Analog audio or audio-visual recordings that were digitized.
* Born-digital audio or audio-visual records.
* Other born-digital files, such as text or images.
* 2-dimensional or 3-dimensional works of art that were digitized, excluding manuscripts.
* Photos, including negatives, that were digitized.
* Books, manuscripts, and other textual materials that were digitized.
* Geospatial data.
* Numeric data sets.
* Software programs, operating systems etc.
* Our fellow did not curate any types of data.
* I don't know.

Discuss other types of research data your fellow curated.

[TEXT BOX HERE]

3. What was the source of the research data that was curated by the fellow? Select all that apply.

* Data from legacy digital projects.
* Research data from researchers at the host institution.
* Research data from researchers at other institutions.
* Research data that was part of the fellow's personal collection.
* Research data from a research group that the fellow was a member of.
* I don't know.

Discuss other sources of the research data.

[TEXT BOX HERE]

**Data Curation Activities in the Fellowship**

The following questions pertain to your fellow's work in the area of data curation. For the purposes of this assessment, we draw a distinction between data curation work as "the active and ongoing management of data through its life cycle" (Question 4) and other data-related work, such as conducting outreach, promotion, assessment, instruction, or policy development related to data infrastructures or services (Question 5).

4. Indicate which of the following data curation activities your fellow performed during the fellowship. Select all that apply.

* Created cataloging records, finding aids or other search/discovery tools.
* Created a website to support use of data collections.
* Data analysis.
* Data appraisal.
* Data gathering.
* Data harvesting.
* Data migration.
* Digital preservation implementation, such as ingesting collections to preservation systems.
* Digital preservation planning.
* Digitization/reformatting
* Documentation of data curation workflows/procedures.
* Metadata creation.
* Metadata enhancement.
* Mark-up, such as text encoding.
* I don't know.
* Our fellow did not undertake any data curation activities.

Discuss other data curation activities performed by the fellow.

[TEXT BOX HERE]

5. Indicate which of the following data-related activities your fellow performed during the fellowship. Select all that apply.

* Drafted institutional policies related to data infrastructures/services.
* Drafted an institutional data management plan.
* Provided data management consultations, such as creating data management plans for digital projects.
* Taught course/workshop on data management and/or use.
* Conducted an assessment of data management practices of a specific researcher, team or department.
* Developed a website related to data collections or services.
* Developed a promotional/outreach program related to the data collections and/or services.
* I don't know.
* Our fellow did not perform any data-related activities.

Other data-related activities undertaken by the fellow.

[TEXT BOX HERE]

**Postdoctoral Fellowship Support**

6. Indicate the types of training/support that were provided to the fellow. Select all that apply.

* Training on the software that our local data curation team uses.
* Training on how to create catalog records using MARC.
* Training on how to create metadata records using Dublin Core or another metadata schema.
* Training on text mark-up.
* Training on web development skills.
* Training in programming or scripting languages.
* Assistance juggling multiple priorities.
* Guidance adjusting to our institution's work schedule.
* Assistance with personal issues (moving, housing, taxes, etc.).
* Our fellow didn't require any support.
* I don't know if our fellow required any support.

Indicate other types of support you provided the fellow.

[TEXT BOX HERE]

7. Which strategies did you use to support your fellow's training needs? Select all that apply.

* Release time to take a specific data curation class or workshop.
* Release time to take relevant library school courses.
* Specific instruction on software used for the project.
* We provided guidance on all aspects of data curation used in our department/library.
* We assigned a colleague who mentored the fellow.
* No additional assistance was offered; the fellow learned on their between own.

What other training or support did you or your institution provide your fellow?

[TEXT BOX HERE]

#### Communication

#### These questions relate to the communication between CLIR and the host institution, as well as the host institution and the fellow. We recognize that COVID-19 may have affected when and how you communicated with your fellow. Please share these changes.

#### 8. On average, how frequently did you meet with your fellow during the course of the fellowship? Select only one answer.

* Weekly.
* Bi-weekly.
* Monthly.
* As needed.
* When my fellow set up an appointment.
* I don't remember.

Share comments relating to frequency of communication.

[TEXT BOX HERE]

9. Indicate your level of agreement with the following statements regarding communication.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Strongly disagree** | **Disagree** | **Neutral** | **Agree** | **Strongly agree** | **I don’t know** | **N/A** |
| Communication with CLIR about the program was timely. |  |  |  |  |  |  |  |
| CLIR provided information that allowed my institution to make effective decisions. |  |  |  |  |  |  |  |
| Information from CLIR allowed for timely decision making. |  |  |  |  |  |  |  |
| Communication with my fellow supported success in the project. |  |  |  |  |  |  |  |
| Communication with my fellow allowed for timely decision making. |  |  |  |  |  |  |  |
| Communication with my fellow allowed me to understand progress on the project. |  |  |  |  |  |  |  |
| Communication with my fellow allowed problems to be addressed in a timely manner. |  |  |  |  |  |  |  |
| COVID-19 had a major impact in the effectiveness of communication with the fellow. |  |  |  |  |  |  |  |
| Our organization provided tools to assure effective communication with the fellow. |  |  |  |  |  |  |  |
| A communication plan with my fellow was established early in their tenure. |  |  |  |  |  |  |  |

#### Share any comments regarding communication.

#### [TEXT BOX HERE]

**Conclusion and thank you**

10. Please share how COVID-19 affected your fellow's experience.

[TEXT BOX HERE]

11. Would you consider submitting an application to host a CLIR postdoctoral fellow again? Select only one.

* Yes
* No
* Maybe

If no or maybe, what changes need to be made for you to consider being a host institution again?

[TEXT BOX HERE]

#### 12. What advice would you give future host institutions?

#### [TEXT BOX HERE]

### Interview Guide

#### Introductory information

* Evaluator Introduction
* Background information: Brief review of the purpose of the interview
* Objectives:
  + Identify data curation challenges that emerged during the data curation fellowship and how these challenges were addressed.
  + Identify what host institutions learned about data curation.
  + Gather information on the impact of the pandemic on the fellowship experience
  + Gather information on the impact of the pandemic on data curation efforts.
  + Gather information on the impact of contemporary social justice movements (e.g., protests/campaigns against police violence in Black communities, against gentrification, deportation, student loan debt, health and economic inequality, or voter suppression, for affordable housing, immigrant rights, indigenous rights, climate justice) on data curation,
  + Obtain information regarding collaborative efforts on data curation,
  + Obtain information regarding benefits of data curation to organizations participating in the CLIR postdoctoral fellowship program,
  + Obtain input regarding changes that can be incorporated in future CLIR postdoctoral programs.

#### Interview Questions

* Briefly describe the postdoctoral fellowship project (2-3 sentences). Describe your role as the supervisor.
* Has the purpose or goal/s of the project changed or been modified? If so what were the changes?
* What were—or have been so far—the key successes during the fellow’s time at your organization?
* What challenges or barriers were or have been encountered during the fellowship? How were they addressed?
* Has the library/department where the fellow worked implemented any permanent changes in the way data or other digital resources are managed/curated due to the fellowship?
* What was the impact of COVID-19 and the contemporary social justice movements on the fellow, the fellowship and your organization?
  + Has the global pandemic or contemporary social justice movements presented challenges to you and the fellow in accomplishing the project goals and/or activities? How did you address these challenges?
  + Did your organization implement changes in its data curation priorities or practices in order to address any issues related to the contemporary social justice movements? Was the fellow involved in making these changes? If so, what was the fellow’s role?
  + What changes has your organization made as a result of COVID-19 and contemporary social justice movements that might affect future fellowships and fellows?
* What, if anything, did your organization learn about data curation from being part of the fellowship program?
* What organizations or campus departments might you collaborate with on future data curation projects? In the larger digital library/digital humanities community?
* For many organizations, the fellow has been considered a “contingent” worker (e.g., a fixed term, term-limited, or temporary employee).
  + If this was the case, what, if any, issues did you or the fellow encounter as a result of having this status?
  + Did these issues affect the fellow’s ability to meet the fellowship’s goals and activities?
  + What changes might you recommend to mitigate the impacts of the fellow’s status as a contingent worker?
* Overall, has your organization or department’s culture changed in any way because of having the fellow as a member of the staff?
* What recommendations do you have for CLIR for future postdoctoral fellows and fellowships?
* Please share any additional comments regarding the fellowship that you haven’t already shared.

**Data Curation definition:**[The University of Illinois’ Graduate School of Library and Information Science](http://www.lis.illinois.edu/) defines data curation as “the active and ongoing management of data through its life cycle of interest and usefulness.” This life cycle comprises steps of conceptualizing, creating, accessing, using, appraising, selecting, disposing, ingesting, reappraising, storing, reusing, and transforming data. During [this process](http://www.techrepublic.com/article/data-curation-takes-the-value-of-big-data-to-a-new-level/), data might be annotated, tagged, presented, and published for various purposes. Data curation means active management of data, reducing threats to its long-term value and mitigating digital obsolescence.

The privacy and autonomy of source communities and the proprietary nature of much data are key considerations in enacting data curation strategies.

# Appendix C: Interview Guide for Program Leaders

1. How long have you worked with the CLIR postdoctoral fellowship program? How long have you worked with the data curation fellowship program? What has been your primary role?
2. What do you see as the primary goals of the data curation fellowship program? From your perspective, how have these goals been met? Are there areas in which the program has been modified to meet the goals? If so, how?
3. How has the environment that the program operates within changed over its history, and how has that affected the program? What specific adjustments or changes in focus have been made?
4. From your perspective, how have the host institutions’ interests changed in relation to data curation, and how has that affected the fellows and the program?
5. From your perspective, how have the fellows changed over the history of the program? Are today’s recent postdoctoral candidates different from those you met in earlier years? If so, how?
6. How has the data curation fellowship program been modified to accommodate changes at the host institutions and differences between today’s fellows and fellows of the early 21st century?
7. What directions does the data curation fellowship program need to take, at the host institution level and at CLIR? *Probe*: Does the goal or purpose of the program remain the same? Does how the goal is realized change in any way? If so, how?
8. The assessment has identified several findings that CLIR and host institutions might address. How might the program or other future programs address these?
   1. Fellows are part of the nontenured faculty and temporary workers at the host organization, making it difficult for them integrate into the institutional environment.
   2. Several of the fellows’ projects were legacy projects with no campus or library champion, resulting in a “siloing” of the project and the fellow. This situation leads to a feeling of isolation for the fellow.
   3. Recent fellowships have moved away from the traditional data curation technology areas into the nontechnical areas of data curation, such as community engagement, networking both locally and internationally, and teaching. Different skills, training and tools are required for these activities.
9. What information from this evaluation project is critical for the future development of the program?
10. What do you see as the value in continuing the CLIR data curation fellowship program in the future?

# Appendix D: Survey for Current and Former Data and Software Curation Fellows, 2021

#### *Welcome and Introduction*

The Council on Library and Information Research has received funding from The Andrew W. Mellon Foundation to support a survey of all data curation postdoctoral fellows since 2012. CLIR has contracted with independent consultants, Liz Bishoff of The Bishoff Group and Tom Clareson of Lyrasis, to conduct this survey.

This survey will collect information about:

* your fellowship experiences;
* your post-fellowship experiences; and
* your views on the most significant impacts of the fellowship program.

Your responses will not be viewed by anyone except the consultants, who will aggregate information prior to sharing with CLIR, to assure anonymity.

The survey will take approximately 20 minutes to complete. You may enter and exit the survey at any time. There is an icon in the upper-right-hand corner of the screen that you can use to exit the survey. To exit and re-enter, you will need to enable cookies on your browser, as this is the way Survey Monkey tracks the respondents. Additionally, you will need to use the same browser and the same device to complete the survey.

Be sure to click on the DONE button to submit your survey. Once you have submitted your survey, you cannot return to update or change your answers.

Sincerely,

Christa Williford

Senior Director, Research and Assessment

#### Demographic Information

This section of the survey collects information that will help the evaluation team analyze survey results.

\* 1. What year did your CLIR Postdoctoral Fellowship begin? Select only one answer.

* 2012
* 2013
* 2014
* 2015
* 2016
* 2017
* 2018
* 2019

\* 2. Which of the following types of fellowships did you or do you hold? Select only one answer.

* Data curation for African American and African studies
* Data curation for early modern studies
* Data curation for energy economics or energy social science
* Data curation for Latin American and Caribbean studies
* Data curation for medieval studies
* Data curation for the sciences and social sciences
* Data curation for visual studies
* Software curation

\* 3. Which gender identity do you identify with? Select only one answer.

* Woman (including Transgender woman)
* Man (including Transgender man)
* Gender variant/Non-conforming
* I prefer not to answer.
* Specify other gender identity

[TEXT BOX HERE]

\* 4. Which racial or ethnic group do you most identify with? Select all that apply.

* White or Caucasian
* Black or African American
* Hispanic or Latinx
* Asian or Asian American
* American Indian or Alaska Native
* Native Hawaiian or other Pacific Islander
* I prefer not to answer
* If needed, identify another racial or ethnic group that you identify with:

[TEXT BOX HERE]

\* 5. Describe your current or most recent position. If you are working more than one position, please select the primary position. Select all that apply.

* Permanent or tenure-track position at an academic library
* Contingent or term-limited position at an academic library
* Permanent or tenure-track position as academic faculty
* Contingent or term-limited position as academic faculty
* Position neither faculty nor library appointment at an academic institution
* Position at a government agency
* Position at a museum or other cultural heritage organization
* Position at a nonprofit organization
* Postdoctoral fellowship (CLIR or other)
* Position in private industry
* Self-employed
* Describe your current or recent primary position if not listed above:

[TEXT BOX HERE]

#### Fellowship Experience

This section of the survey will collect information regarding your experience as a CLIR postdoctoral fellow, focusing on areas of responsibility, accomplishments, and the impact you had on your host institution during your fellowship.

6. Which of the following were among your significant responsibilities during your fellowship? Select all that apply.

* Implementing a specific project or projects
* Conducting a needs assessment
* Planning for strategies to meet identified needs
* Creating and delivering education and training (e.g., workshops, one-on-one consultations). Contributing to infrastructure development
* Contributing to software development
* Contributing to software implementation
* Conducting community outreach on campus and/or outside the institution
* Promoting the use of specific collection/s
* Contributing to the digitization of materials
* Contributing to the creation of metadata

Share any additional responsibilities you undertook during your fellowship:

[TEXT BOX HERE]

7. Which of the following were or will be among the most significant accomplishments by the end of your fellowship? Select all that apply.

* Implementing a specific project or projects
* Conducting a needs assessment
* Planning for strategies to meet identified needs
* Creating and delivering education and training (e.g., workshops, one-on-one consultations) Contributing to infrastructure development
* Contributing to software development
* Contributing to software implementation
* Conducting community outreach on campus and/or outside the institution Promoting the use of specific collection(s)
* Contributing to the digitization of materials
* Contributing to the creation of metadata

Share additional comments regarding your significant contributions.

[TEXT BOX HERE]

8. For each area of responsibility below, choose the statement that best describes the impact of your work as a fellow on your host institution.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **I was able (or will be able) to make a positive impact** | **I was able (or will be able) to make a moderate impact** | **I made (or will make) no impact** | **I don't know** | **I did (or do not) have this responsibility** |
| Implementing a specific project or projects |  |  |  |  |  |
| Conducting a needs assessment |  |  |  |  |  |
| Planning strategies to meet identified needs |  |  |  |  |  |
| Creating and delivering education and training (e.g., workshops, one-on-one consultations) |  |  |  |  |  |
| Contributing to infrastructure development |  |  |  |  |  |
| Contributing to software development, including tools |  |  |  |  |  |
| Contributing to software implementation |  |  |  |  |  |
| Conducting community outreach both on campus and outside the institution |  |  |  |  |  |
| Contributing to the digitization of collections |  |  |  |  |  |
| Contributing to the creation of metadata |  |  |  |  |  |
| Promoting the use of one or more specific collections |  |  |  |  |  |

Comment on the impact of your work as a fellow on your host institution.

[TEXT BOX HERE]

9. For each area of responsibility below, choose the statement that best describes the impact that your work as a fellow had or will have on thefield of data or software curation.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **I was able (or will be able) to make a positive impact** | **I was able (or will be able) to make a moderate impact** | **I made (or will make) no impact** | **I don't know** | **I did (or do not) have this responsibility** |
| Implementing a specific project or projects |  |  |  |  |  |
| Conducting a needs assessment |  |  |  |  |  |
| Planning strategies to meet identified needs |  |  |  |  |  |
| Creating and delivering education and training (e.g., workshops, one-on-one consultations |  |  |  |  |  |
| Contributing to infrastructure development |  |  |  |  |  |
| Contributing to software development, including tools |  |  |  |  |  |
| Contributing to software implementation |  |  |  |  |  |
| Conducting community outreach both on campus and outside the institution |  |  |  |  |  |
| Contributing to the digitization of collections |  |  |  |  |  |
| Contributing to the creation of metadata |  |  |  |  |  |
| Promoting the use of one or more specific collections |  |  |  |  |  |

Comment on the impact of your work as a fellow on the field of data or software curation.

[TEXT BOX HERE]

10. For each area of responsibility below, chose the statement that best describes the impact that your work as a fellow had or will have on your academic discipline or field of expertise.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **I was able (or will be able) to make a positive impact** | **I was able (or will be able) to make a moderate impact** | **I made (or will make) no impact** | **I don't know** | **I did (or do not) have this responsibility** |
| Implementing a specific project or projects |  |  |  |  |  |
| Conducting a needs assessment |  |  |  |  |  |
| Planning strategies to meet identified needs |  |  |  |  |  |
| Creating and delivering education and training (e.g., workshops, one-on-one consultations) |  |  |  |  |  |
| Contributing to infrastructure development |  |  |  |  |  |
| Contributing to software development, including tools |  |  |  |  |  |
| Contributing to software implementation |  |  |  |  |  |
| Conducting community outreach both on campus and outside the institution |  |  |  |  |  |
| Contributing to the digitization of collections |  |  |  |  |  |
| Contributing to the creation of metadata |  |  |  |  |  |
| Promoting the use of one or more specific collections |  |  |  |  |  |

Comment on the impact of your work as a fellow on your academic discipline or field of expertise.

[TEXT BOX HERE]

11. Which of the following nontechnical, data-related activities did you perform during your fellowship? Select all that apply.

* Drafted data-related policies and plans
* Consulted on data management for project or proposals
* Taught data management, analysis and/or use courses/workshops
* Developed community outreach programs incorporating data/digital collections/services
* Collaborated with academic departments on data-related activities
* None of the above

Describe other data-related activities you performed.

[TEXT BOX HERE]

12. Choose the statement that best describes the impact of the CLIR Postdoctoral Fellowship Program on your fellowship experience.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Aspect was critical to my success** | **Aspect had a positive impact on my success** | **Aspect had no impact on my success** | **Aspect had a negative impact on my success** | **Aspect was a waste of time** | **I didn’t experience this aspect** | **I don’t know** | **N/A** |
| Attending the summer seminar |  |  |  |  |  |  |  |  |
| Attending mid-fellowship meetings (CNI Meeting/DLF Forum) |  |  |  |  |  |  |  |  |
| Attending online sessions for fellows |  |  |  |  |  |  |  |  |
| Interacting with my supervisor |  |  |  |  |  |  |  |  |
| Interacting with fellows and former fellows |  |  |  |  |  |  |  |  |
| Interacting with program staff and faculty |  |  |  |  |  |  |  |  |
| Leading or participating in a 'microgrant' project |  |  |  |  |  |  |  |  |
| Participating in one or more inquiry groups (2017-2020 fellows) |  |  |  |  |  |  |  |  |
| Participating in one or more of the collaborative writing projects |  |  |  |  |  |  |  |  |

Provide comments on the impact of the above CLIR program components on your experience.

[TEXT BOX HERE]

13. Which of the following technical skills or experiences did you acquire during your fellowship? Select all that apply.

* Library skills, such as cataloging, collection development, working with research databases or integrated library systems
* Website development, including web design, creating online exhibits
* Data modeling and management skill development, including database design, data ingest, etc.
* Programming skills, including coding or scripting languages, version control
* Data analysis, visualization or data manipulation
* Creation of digital special collections/archives
* Creation of metadata, including working with metadata standards, harvesting metadata
* Digital preservation skills, including verification of data integrity, migration of data to newer formats
* None of the above

Describe other technical skills you acquired as a fellow.

[TEXT BOX HERE]

14. Recent fellows and supervisors interviewed by our assessment team have identified several challenges that inhibited the success of fellows. We would like to get a sense of the impact of those factors on the fellows over time. Thinking about your experience, how challenging do you think the following situations were for you?

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Very challenging** | **Somewhat challenging** | **Neutral** | **Not very challenging** | **Not at all challenging** | **I don’t know** | **N/A** |
| Working within the limitations of a contingent worker |  |  |  |  |  |  |  |
| Being relatively isolated as I undertook  my project |  |  |  |  |  |  |  |
| Working on a project with limited support |  |  |  |  |  |  |  |
| Lack of training from CLIR to support my fellowship |  |  |  |  |  |  |  |
| Lack of training from my host institution to support my fellowship |  |  |  |  |  |  |  |
| Lack of training from CLIR for career development |  |  |  |  |  |  |  |
| Lack of support or resources from my host institution for my work |  |  |  |  |  |  |  |
| Earning the trust of co-workers |  |  |  |  |  |  |  |

Share comments related to above statements:

[TEXT BOX HERE]

#### Post-Fellowship Experiences and Observations

This section should be completed by only those fellows who have completed their fellowships.

15. Which of the following CLIR-related activities have you participated in since leaving your fellowship? Select all that apply.

* Attending one or more DLF Forums
* CLIR-sponsored research project(s)
* Collaborative writing group(s)
* Fellowship microgrant project(s)
* Guest-speaking at fellowship meeting(s) for other cohorts
* Interaction with other former fellows from my cohort
* Leading Change Institute
* A panel or presentation at a conference related to CLIR's programs
* Reviewing proposals or applications submitted to CLIR or DLF
* Serving on a CLIR or DLF advisory committee
* Serving on one or more DLF committees or working groups
* Social or networking event(s) for CLIR Postdoctoral Fellowship community
* Summer seminar(s)
* I haven't participated in any CLIR fellowship activities

Identify other CLIR activities that you've participated in since leaving your fellowship.

[TEXT BOX HERE]

16. Indicate your level of agreement with the following statements about CLIR.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Strongly agree** | **Agree** | **Neither agree nor disagree** | **Disagree** | **Strongly disagree** | **I don’t know** |
| The Postdoctoral Fellowship Program has made a positive difference in my career. |  |  |  |  |  |  |
| The Postdoctoral Fellowship Program has made a positive difference in the practices of host institutions. |  |  |  |  |  |  |
| The fellows' alumni network is a valuable resource for building my career. |  |  |  |  |  |  |
| The fellows' alumni network offers unexpected career opportunities. |  |  |  |  |  |  |
| I am in regular contact with colleagues I met through my CLIR Postdoctoral Fellowship. |  |  |  |  |  |  |

Share any additional comments related to the impact of the CLIR Postdoctoral Program.

[TEXT BOX HERE]

17. Rank the following kinds of support and activities that the CLIR Postdoctoral Fellowship Program could provide to alumni in the next five years in priority order, with 1 being the top priority and 10 being the lowest priority.

* Clarify the program's vision and mission
* Host more online social/networking opportunities for the fellowship community
* Host online technical skill-building opportunities (e.g., programming) for the fellowship community
* Host online interpersonal skill-building opportunities (e.g., job interviewing) for the fellowship community
* Increase management and leadership development opportunities for fellowship supervisors
* Provide a clearinghouse of information about alumni and their work
* Provide a clearinghouse of professional development content created for fellows and others
* Provide financial resources and guidance for organizing networking opportunities
* Provide more structure for members of the fellowship community undertaking program-sponsored projects

18. In 10 or fewer words, what do you believe is the most significant impact of the CLIR Postdoctoral Fellowship Program?

[TEXT BOX HERE]

#### Conclusion and Thank You

Thank you for taking the time to contribute your impressions of the CLIR Postdoctoral Fellowships in Data and Software Curation. The information you've shared will help CLIR's evaluation team members to contextualize their current findings and to refine the recommendations they will make in a report to be published by CLIR.

PLEASE BE SURE TO CLICK THE DONE BUTTON TO SUBMIT YOUR SURVEY. Once you have submitted your survey, you cannot revise or update it.

# Appendix E: Survey for Current and Former Data and Software Curation Fellowship Supervisors, 2021

*Welcome and Introduction*

The Council on Library and Information Resources received funding from The Andrew W. Mellon Foundation for a program that included a survey of current and former supervisors of all data and software curation fellows who started fellowships from 2012 to 2019. CLIR has contracted with independent consultants, Liz Bishoff of The Bishoff Group and Tom Clareson of Lyrasis, to conduct this survey.

This survey will collect information about:

* the host institution's experiences with CLIR Postdoctoral Fellows
* the impact of the data and software curation fellows on the host institution
* recommendations for future Postdoctoral Fellowship Program activities.

Your responses will not be viewed by anyone except the consultants, who will aggregate information prior to sharing with the CLIR, to assure anonymity.

Your fellow/s may have engaged with others in your institution. You may need to connect with these colleagues to gather input for this survey. We request that only ONE survey be returned from each institution. We are attaching a PDF version of the survey so that you can share it with others in your institution for their review.

The survey will take approximately 20 minutes to complete. You may enter and exit the survey at any time. There is an icon in the upper-right-hand corner of the screen that you can use to exit the survey. To exit/reenter, you will need to enable cookies on your browser, as this is the way Survey Monkey tracks the respondents. Additionally you will need to use the same browser and the same device to complete the survey.

Please remember to click the 'DONE' button at the end of the survey to save your input. Once you have submitted your results, you will not be able to go back to the survey to change or update your answers.

Sincerely,

Christa Williford

Senior Director, Research and Assessment

#### Demographic Information

\* 1. How many CLIR postdoctoral fellows has your organization hosted? Select only one answer.

* 1
* 2
* more than 2

\* 2. In what year(s) did your fellow(s) begin their fellowship(s)? Select all that apply.

* 2012
* 2013
* 2014
* 2015
* 2016
* 2017
* 2018
* 2019
* I don’t remember.

\* 3. Which of the following types of fellowships did you or do you supervise? Select all that apply.

* Data Curation for African American and African Studies
* Data Curation for Early Modern Studies
* Data Curation for Energy Economics or Energy Social Science
* Data Curation for Latin American and Caribbean Studies
* Data Curation for Medieval Studies
* Data Curation for the Sciences and Social Sciences
* Data Curation for Visual Studies
* Software Curation
* I don't remember

\* 4. Choose the option that best describes your current or most recent job. Select only one.

* Position in an academic library
* Position as academic faculty
* Position at an academic institution that is neither faculty nor library appointment
* Position at a government agency
* Position in a museum or other cultural heritage organization
* Position in a nonprofit organization
* Position in private industry
* Self-employed
* Other (please specify)

[TEXT BOX HERE]

**Host Experience**

The questions in this section have been designed to accommodate a variety of circumstances. If the fellow you are currently supervising remains in the fellowship, respond based on your experience to date. If the fellow you supervised departed the fellowship early and did not complete it, or if you have supervised the fellow for only part of the fellowship, answer the questions in this section on the basis of your experience with the fellow and add clarifying comments, noting these factors if they are relevant to your response. If you supervised more than one fellow in data or software curation who began the fellowship from 2012 to 2019, answer the questions thinking only of your most recent experience as a supervisor of one of those fellows.

5. Choose the option(s) that describes the host institution's goals in having a CLIR fellow in data or software curation. Select all that apply.

* Implementing a specific project or projects
* Conducting a needs assessment
* Planning strategies to meet identified needs
* Creating and delivering education and training (e.g., workshops, one-on-one consultations)
* Developing infrastructure (e.g., institutional repository, data curation policies)
* Developing or implementing software
* Conducting community outreach on campus and/or outside the institution
* Promoting the use of specific collection(s)
* Digitizing materials
* Creating metadata

Share other goals the host institution had for the CLIR fellow.

[TEXT BOX HERE]

6. Were the host institution's goals met? Select one.

* Yes
* No
* Partially

If no or partially, explain why the goals weren't met or were partially met.

[TEXT BOX HERE]

7. What have been the critical successes of the fellowship? If you hosted more than one fellow, consider only your most recent fellow. Select all that apply.

* Fellow created or expanded the institution's or department's community outreach program.
* Fellow helped build new collaborative partnerships.
* Fellow raised awareness of the importance of data management among the institution's researchers and students.
* Fellow raised awareness of the importance of devoting institutional resources to data curation.
* Fellow was a needed change agent in the institution.
* Fellowship changed colleagues' perspectives on the value that recent PhDs bring to the work of the unit.
* Fellowship made it possible to implement a specific project or projects.
* None of the above.

Share additional comments related to critical successes.

[TEXT BOX HERE]

8. Recent fellows and supervisors interviewed by our assessment team have identified several challenges that inhibited the success of their fellowships. We would like to get a sense of the impact of those factors on the fellows over time. Thinking about the most recent data or software curation fellow you supervised, how challenging do you think the following situations were for the fellow?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Very challenging** | **Somewhat challenging** | **Not at all challenging** | **I don’t know** | **N/A** |
| Working within the limitations of the fellow's contingent status |  |  |  |  |  |
| The fellow's isolation as they undertook their project(s) |  |  |  |  |  |
| Lack of training from CLIR to support the fellow |  |  |  |  |  |
| Lack of training from the host institution to support the fellow |  |  |  |  |  |
| Lack of support or resources from the host institution for the fellow's work |  |  |  |  |  |
| Navigating institutional bureaucracy |  |  |  |  |  |

Add any further comments about these or other challenges you saw your fellow facing during the fellowship.

[TEXT BOX HERE]

9. What type/s of educational and career development support did the host institution provide the fellow? Select all that apply.

* Career development support; e.g., résumé development
* Mentorship from a colleague other than the supervisor(s)
* Time to take courses related to fellowship
* Time to work on publication(s) related to fellowship or research interest
* Training in project management
* Training on metadata creation or other kinds of description for digital materials
* Training to use software needed for their work
* Other training related to data curation
* No specific training, the fellow learned on their own
* I don't remember
* I don't know

Please add further comments related to the host institution's support of the fellow.

[TEXT BOX HERE]

10. From your observations, what opportunities did the fellowship provide the fellow to demonstrate their skills and knowledge in the following areas?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Was an expert prior to fellowship** | **Gained expert understanding and worked independently** | **Gained advanced understanding and worked with limited guidance** | **Gained intermediate understanding, worked with some guidance** | **Gained basic knowledge, couldn’t work independently** | **N/A** |
| Creating digital collections |  |  |  |  |  |  |
| Creating metadata |  |  |  |  |  |  |
| Data analysis, visualization, manipulation, etc. |  |  |  |  |  |  |
| Data modeling and management skills; e.g., database design, data ingest, etc |  |  |  |  |  |  |
| Digital preservation; e.g., creating disk images, verifying data, migrating data |  |  |  |  |  |  |
| Programming skills; e.g., coding or scripting language, version control |  |  |  |  |  |  |
| Website development; e.g., web design, creating online exhibits |  |  |  |  |  |  |

Add any further comments related to the fellow's knowledge/skills development.

[TEXT BOX HERE]

11. Was your institution able to hire the data or software curation fellow at the end of the fellowship? Consider only your most recent fellow. Select one.

* Yes
* No, at the time, we did not have an open position
* No, we needed the fellow only for the duration of the fellowship
* No, we offered the fellow a position, but they turned it down
* No, the fellow wasn't suitable for a permanent position
* I don't remember

Provide additional information regarding the host institution's ability to hire the fellow.

[TEXT BOX HERE]

12. Based on your experience, what could the host institution have done to better prepare to host the fellow?

[TEXT BOX HERE]

13. To your knowledge, has the host institution implemented any permanent changes because of the CLIR fellowship? Select all that apply.

* The institution maintains a project(s) the fellow created or advanced.
* The institution changed its data curation practice to address needs identified or recommendations made by the fellow.
* The institution continues to offer courses, education, and training opportunities developed by the fellow.
* The institution maintains a data storage solution developed or advanced by the fellow.
* The institution maintains software tool(s) or service(s) developed or implemented by the fellow.
* The institution maintains a community outreach program(s) or collaborative partnership developed or advanced by the fellow.
* The institution maintains a digital collection created and/or curated by the fellow.
* The institution didn't implement any changes because of the fellowship.

Provide additional information regarding the impact of the fellow's work on the host institution's data or software curation efforts.

[TEXT BOX HERE]

14. Indicate your level of agreement with the following statements.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Strongly agree** | **Agree** | **Neither agree nor disagree** | **Disagree** | **Strongly disagree** | **I don’t know** |
| The fellowship program was an opportunity to introduce new types of staff into the host institution |  |  |  |  |  |  |
| The fellow brought a researcher's perspective to the host institution |  |  |  |  |  |  |
| The fellow served as a change agent at the host institution |  |  |  |  |  |  |
| The host institution's data curation or data management program was advanced because of the fellowship |  |  |  |  |  |  |
| The host institution maintains a community outreach program(s) developed or advanced by the fellow |  |  |  |  |  |  |
| The host institution maintains a collaborative partnership developed or advanced by the fellow |  |  |  |  |  |  |
| Two years is sufficient time to provide a meaningful career development experience for a recent PhD |  |  |  |  |  |  |
| My current institution would be willing to participate in a three-year fellowship program |  |  |  |  |  |  |
| My current institution would be interested in hosting a fellow in the future |  |  |  |  |  |  |

Provide additional comments regarding the impact of the fellow on the host institution.

[TEXT BOX HERE]

**Experience with CLIR**

This section is designed to collect your impressions and opinions about CLIR and the future of the Postdoctoral Fellowship Program. As you answer these questions, think about your experience with CLIR and CLIR's Postdoctoral Fellowship Program it its entirety.

15. Indicate your level of agreement with the following statements about the host institution's experience with CLIR postdoctoral fellowship program.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Strongly agree** | **Agree** | **Neither agree nor disagree** | **Disagree** | **Strongly disagree** | **I don’t know** |
| CLIR's programs are relevant to my institution’s work |  |  |  |  |  |  |
| CLIR's programs are unique among professional organizations |  |  |  |  |  |  |
| Being part of a CLIR fellows cohort was a valuable experience for the fellow(s) I supervised |  |  |  |  |  |  |
| CLIR provided an appropriate level of guidance and support to help the institution host a successful fellowship |  |  |  |  |  |  |
| Communication with CLIR about the fellowship program was timely |  |  |  |  |  |  |
| Communication with CLIR about the fellowship program was timely |  |  |  |  |  |  |
| The CLIR postdoctoral fellowship program has made a positive difference for the host institution |  |  |  |  |  |  |
| The CLIR postdoctoral fellowship program is making a positive difference in the field of data curation |  |  |  |  |  |  |

Share additional comments about the benefits of CLIR's programs or CLIR's postdoctoral fellowship program for host institutions.

[TEXT BOX HERE]

16. Rank in priority order the following kinds of support and activities that you think CLIR could provide host institutions and supervisors in the next five years, with 1 being the top priority and 8 being the lowest priority.

* Clarification of the postdoctoral fellowship program's vision and mission
* Clearinghouse of professional development content for fellows so others can reuse it within and outside the fellowship community
* Clearinghouse of information about past and current fellowship projects
* Expand online social/networking opportunities for the fellowship community (including supervisors and former supervisors)
* Increase guidance and support for host institutions developing position descriptions for future fellowships
* Offer more online technical skill-building opportunities (e.g., programming or coding) for the fellowship community
* Offer more online interpersonal skill-building opportunities (e.g., job interviewing) for the fellowship community
* Offer more management and leadership development opportunities for fellowship supervisors

17. In 10 or fewer words, what do you believe is the most significant impact of the CLIR Postdoctoral Fellowships in Data and Software Curation Program?

[TEXT BOX HERE]

**Thank you**

Thank you for taking the time to contribute your impressions of the CLIR postdoctoral fellowships in data and software curation. The information you've shared will help CLIR's evaluation team members to contextualize their current findings and to refine the recommendations they will make in a report to be published by CLIR.

PLEASE BE SURE TO CLICK THE DONE BUTTON TO SUBMIT YOUR SURVEY. Once you have submitted your survey, you cannot revise or update your answers.

# Appendix F: Focus Group Discussion Guide for Current and Former Fellows

1. Introductory information

* Introductions: participants and facilitators
* Agenda review
* Background information on purpose of focus groups
* Objectives
  + Obtain feedback from fellows regarding their experiences
  + Obtain recommendations regarding future CLIR Postdoctoral Fellowship activities
* Process Agreement

2. Brief introduction of focus group participants describing fellowship—two or three sentences.

3. From your perspective, what do you see as the most successful aspect of your fellowship? What area most needed improvement?

4. In the survey, fellows gave mixed responses regarding the overall impact of their fellowship on the host institution. What might you suggest to CLIR, host institutions, and future fellows to realize greater impact?

5. Some of the fellowships are very specific and structured, while others offer fellows a great deal of autonomy and choice in the projects they pursue. In the survey, several fellows made observations about the benefits and drawbacks of having clearly defined projects versus having choices. Based on your experience of how your ,responsibilities were defined, what do you see as the benefits and challenges of each approach, and what recommendations do you have for CLIR and host institutions in defining fellowship roles and responsibilities?

6. In most host institutions, fellows are contingent workers. From this position, fitting into the organizational culture can present challenges. If you experienced this situation, what strategies have you or your host institution used to improve your success? What strategies would you suggest to other host institutions and fellows to address this situation?

7. Some fellows left their positions early; others stayed the full two years. Based on your own experience, share your thoughts on the length of the fellowship. How would you compare the benefits and challenges of a two-year fellowship with those of a three-year or longer fellowship?

8. Which aspects of the fellowship program had the greatest impact on your development, and why?

9. COVID-19 continues to affect the way individuals and organizations function. If you were a fellow during the pandemic, what changes did your organization make to support your work, and how effectively did you, and your colleagues, adapt? Do you have any advice for how CLIR and host institutions could better prepare for working remotely or for dealing with future disruptions?

10. CLIR is exploring opportunities that they could offer to alumni of the Postdoctoral Fellowship Program in the future. CLIR would like assistance in prioritizing these opportunities. What kinds of activities would be most meaningful to you: informal networking within the alumni community, learning activities (leadership development, skills development, etc.), teaching and/or presenting, writing or publishing, opportunities to collaborate on projects, or something else?

11. What else would you like to share with us today that you haven’t already had an opportunity to say?

# Appendix G: Focus Group Discussion Guide for Current and Former Supervisors

1. Introductory information

* Introductions: participants and facilitators
* Agenda review
* Background information on purpose of focus groups
* Objectives
  + Obtain feedback from host institution supervisors regarding their experiences with the program
  + Obtain recommendations regarding future CLIR postdoctoral fellowship activities
* Process Agreement

2. Brief introduction of participants describing host institution fellowship program—two or three sentences.

3. From your perspective as a host institution supervisor, what was the most successful aspect of the fellowship you supervised? What area most needed improvement?

4. In the survey, fellows gave mixed responses regarding the overall impact of their fellowship on the host institution. What might you suggest to CLIR, host institutions, and future fellows to realize greater impact?

5. Some of the fellowships are very specific and structured, while others offer fellows a great deal of autonomy and choice in the projects they pursue. In the survey, several fellows made observations about the benefits and drawbacks of having clearly defined projects versus having choices. Based on your experience of how your fellow’s responsibilities were defined, what do you see as the benefits and challenges of each approach, and what recommendations do you have for CLIR and host institutions in defining fellowship roles and responsibilities? If the fellowship were three or four years long instead of two, how should CLIR and host institutions adjust their approach?

6. In most host institutions, fellows are contingent workers. From this position, fitting into the organizational culture can present challenges for the fellow. If your fellow experienced this situation, what strategies have you or your host institution used to improve success? What strategies would you suggest to other host institutions and fellows to address this situation?

7. COVID-19 is affecting the way individuals and organizations function. If you had a fellow during the pandemic, what changes did your organization make related to how you worked with your fellow? If you didn’t have a fellow but might have one in the future, how would your experience of the past year inform your priorities for the fellowship?

8. Some fellows left their positions early; others stayed the full two years. Based on your own experience, share your thoughts on the ideal length of a fellowship. How would you compare the benefits and challenges of a two-year fellowship with those of a three-year or longer fellowship?

9. CLIR is exploring opportunities that they could offer supervisors in the future. CLIR would like assistance in prioritizing these opportunities. What kinds of activities would be most meaningful to you: informal networking within the fellowship community, learning activities (leadership development, skills development, etc.), teaching and/or presenting, writing or publishing, opportunities to collaborate on projects, or something else?

10. What else would you like to share with us today that you haven’t already had an opportunity to say?