



<New Collection Name> – Intake Form

This form will record information that the [University of California Curation Center \(UC3\)](#) uses to establish a new collection in the Merritt preservation system. It records a range of details, including collection description, stewarding organization background, description of intended content, approaches to metadata, and sustainability strategy. It is preferred for this to be completed during an intake interview or consultation with the UC3 Digital Preservation Service Manager.

Prior to completing this form, please review the [Merritt Policies and User Guidelines](#). For more information on Merritt's preservation approach and CoreTrustSeal certification, please visit merritt.cdlib.org

Collection Descriptive Information

Collection Name – Specify the desired name for the collection, as it will appear in the Merritt UI.

Collection Description – Specify a description for the collection. This will be recorded in the Merritt database. It will offer context to future admins of Merritt but will not be displayed to users.

Intended Collection Content Types – Please specify the intended file types to be added to this collection. As stated in the [Merritt Policies and User Guidelines](#), Merritt cannot be used as a preservation repository for sensitive information. Emphasis should be placed on use of robust, longstanding file formats.

Content type/description	Intended Format



Collection Metadata Strategy – Please provide a description of intended object-level metadata that will be made use of for the collection’s content. A review of metadata strategy will take place during consultation for the new collection.

Campus Structures

Campus Org Chart – What is your unit’s relationship to the campus library? Is your unit formally tied to the campus library? Please explain.

Campus Stewardship – Is your campus library involved in and/or responsible for the long-term stewardship of the collection? If not, which unit will be the long-term steward for the collection? Please explain.

Campus Contacts

Campus Users – Please list intended collection users and their email addresses. Follow each entry with desired user permissions (read/write/download). For example: John Williams, jw@mailinator.com, W/R/D. By default, user accounts will be notified of content ingest status.

User Name	Email Address	User Permissions: R/W/D



Shared Accounts – List shared accounts / email aliases that are used by your team and/or across multiple staff. Please specify an email address and permissions as above for each. By default, user accounts will be notified of content ingest status.

Account Name	Email Address	User Permissions: R/W/D

Sustainability Strategy

Storage fees are collected annually through use of a recharge invoice. For more information on pricing, see [Merritt Policies and User Guidelines](#).

Funding – Long-term preservation requires long-term planning of costs. How do you plan to handle the recharge for your collection's storage fees? Please follow-up in writing (an email is acceptable) with your funding plan.

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(If applicable) Other funding sources for digital preservation* – If the long-term preservation is not being directly funded by the library, please specify:

- A) Funding type (private foundation, federal government, designated funding source):
- B) Funding type/funder name:
- C) Grant end date (if applicable):
- D) The number of years it is desired to use for storage charges:
- E) Contingency plan (e.g., which unit will offer financial support after funds expire):
- F) Do you have formal approval from the funder to utilize these funds?

* Exceptions must be reviewed and approved by the CDL Finance Department on a case-by-case basis.

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Consultation Notes

This section to be used by the UC3 Digital Preservation Services Manager to record consultation notes associated with the collection and overarching project.