



APPRAISAL MEETING CHECKLIST

Use this checklist as a guide when preparing for and following up on appraisal meetings.

Before the appraisal meeting:

- ☐ Review and be prepared to answer [Common Appraisal Questions](#)
- ☐ Request information from your appraiser about:
 - Any specific questions they have
 - What records they want to review
 - What offices they want to meet with
- ☐ Identify program staff to include in the meeting
 - Consult your appraiser about possible attendees
 - Collect contact information for follow-up questions
- ☐ Know where the records are kept and arrange for access
- ☐ Know what formats the records are in
- ☐ Identify any possible access issues

For virtual appraisal meetings:

- ☐ Work with your [NARA appraiser](#) to decide if a virtual appraisal visit is appropriate.

Virtual appraisal meetings are appropriate when:

- When records are best viewed through system demonstrations
- When the appraiser can review records in a virtual environment
- Program staff are in different locations

Virtual appraisal meetings are not appropriate when:

- Records are fragile or unique analog formats or otherwise difficult to duplicate. This includes records such as oversized maps and glass plate negatives etc.
- Records are classified.

- ☐ Identify a mutually-acceptable audio and video conferencing software that:

- Can share the screen to provide access to digital content in real time; and
 - Offers multiple means of communication such as video conferencing, telephone, and chat features.
- ☐ Arrange access to records in all formats and create a representative sampling.
- Ask your appraiser what records they will want to see.
 - Be prepared to share records with all meeting participants during or in advance of the meeting.
 - You may need to digitize sample sets of analog records.
 - You may need to arrange for a virtual demo of an information system.
 - You may need to provide examples of electronic records from an information system.

Once the meeting dates are set:

- ☐ Send meeting location and time to all participants
 - Include building access instructions for in-person meetings
- ☐ Work with your appraiser to develop an agenda for the meeting
- ☐ Make sure you have shared the proposed records schedule with all attendees

After the meeting:

- ☐ Arrange follow-up meetings as needed
- ☐ Answer follow-up questions from the appraiser
- ☐ Follow-up on requested schedule revisions, if needed
 - The appraiser will return your schedule in ERA for you to make the revisions