

Donating Organizational Records

Prepared by the Society of American Archivists

Presented by the Oregon Historical Society



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Oregon Historical Society Research Library



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Thanks to the generosity of the people of Oregon as well as people outside the state, the Oregon Historical Society Research Library has been able to build a large and important collection of papers, books, photographs, maps, audio recordings, films, and other historical materials.

We are grateful to you for donating these valuable materials to us, and we look forward to working with you in our continuing efforts to document the history of the Oregon Country.

The following guide will explain why and how we collect the records of organizations and businesses. If you would like to discuss a donation with us, please contact:

Shawna Gandy
Interim Library Director
503.306.5265
Shawna.Gandy@ohs.org

IMPORTANT: Please contact us first before bringing materials to the Historical Society building, since we would like get some idea about what you have and whether it will be possible for us to acquire the materials.

Thank you helping us build the collections of the Oregon Historical Society!

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A Guide to Donating Your Organizational Records to a Repository

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The heart of your organization's memory is in its records. If your organization values its history, you must act to save the original letters, minutes, reports, photographs, publications, and other documents that officers, members, directors, employees, or volunteers have produced and compiled over the years. These documents provide unique testimony to the achievements of your organization. Such materials are also extremely valuable for administrative, legal, fiscal and public relations purposes. Your organization's history is important to your community, too. By donating your organization's records to an archival repository, you will assure that its history and heritage will be part of your community's collective memory forever.

What Can a Repository Offer You?

An archival repository is a place where professional archivists and curators care for and preserve historically significant documents. Historical repositories, also called archives, are frequently found in historical agencies or libraries whose mission it is to ensure the protection and accessibility of the materials they house. An archive can provide environmentally-secure storage for inactive records and thus free valuable space for current business. An archival repository can safeguard the records by monitoring their handling and use. More important, it can provide research access to the information in the records, both to members of your organization and to the public. By placing records in an archival repository you take an important step toward their preservation—and you keep the memories that they contain.

What Documents Should Be Placed in an Archival Repository?

Many of the records produced by an organization have long-term value. A repository is interested in the records that best illustrate the purpose, activities, and policies of your organization. Such documents usually represent an "end product"—a final report, for example, instead of a draft. Archives are more interested in related groups of materials rather than individual items. Records should be inactive—that is, no longer regularly used for routine business. Before records are transferred to an archival repository, an archivist should survey your organization's papers to determine which materials have enduring

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historical value. Because the research value of records may be diminished if items are removed or rearranged, records should not be weeded, discarded, or rearranged before they are examined by an archivist. Listed below are some of the types of documentation which archival repositories preserve for historical and administrative research:

- › Architectural records
- › Articles of incorporation, charters
- › Audio recordings
- › Budgets
- › Bylaws and revisions
- › Clippings
- › Constitution and revisions
- › Correspondence of officers
- › Directories
- › Financial statements
- › Handbooks
- › Legal documents
- › Memoranda
- › Minutes of meetings
- › Membership lists
- › Motion picture film and videotape
- › Newsletters and other publications (generated by the organization)
- › Organizational charts
- › Pamphlets, brochures, fliers, etc.
- › Photographs
- › Planning documents
- › Press releases
- › Reports (annual, committee, etc.)
- › Rosters
- › Scrapbooks
- › Speeches
- › Subject files
- › Tax returns

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A repository may not accept everything that is offered to it because of staff and space constraints. An archivist can help you determine what documents or materials fall within the scope of the repository. If your organization's records are not appropriate for one repository, there may be another one to which they can be referred.

How Does an Archive Operate?

Archives are run by professionals whose first priorities are preserving historical materials and making them available for use. If your organization donates its records, the staff of that repository will be responsible for the care of the records and will continue to work with your organization as you use the records and periodically add to the collection. Feel free to contact the archivist at a nearby library, university, historical society, or museum for details about their archival operations. The Society of American Archivists (info@archivists.org) can also provide you with information and suggestions.

Donations

An archival repository operates much like a business; in general, it cannot invest materials and labor in the preservation of items which it does not own. Not owning the material severely restricts an archives ability to care for records properly. A repository will provide a contract delineating the conditions of the relationship to the mutual agreement of all involved.

Most repositories are not able to promise that donated material will be used in some specific manner as a condition of accepting the gift. Many archives will use material in their collections for exhibits that meet standards for insuring the protection of the records. The repository cannot guarantee specific exhibit or research use of any collection of materials.

If your organization is an ongoing enterprise, it is best to make periodic donations of records. The archivists will discuss with you appropriate intervals for making those donations. To assure regular contact, your organization can add the periodic transfer of inactive records to the duties of one of its officers.

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Access to Collections

The repository's written policies regarding availability, photo duplication, and publication govern access to the papers in the repository. The archivist or curator should discuss the repository's access policies and any special needs or concerns of the donor organization with a designated representative of the organization before completing the donation agreement.

Sensitive material may exist in organizational records. In order to protect the privacy of individuals or trade secrets, it may be necessary to discuss restrictions on access to portions of the collection. While archivists desire to make all papers truly accessible to researchers, they normally will agree to reasonable restrictions for a distinct period of time.

Copyright

Assignment of copyright is a complex matter, and the organization should discuss issues of copyright ownership prior to completing a donor agreement.

Tax Deductions

Your organization should speak with its tax accountant or attorney about the possibility of a tax deduction for the donation of material to an archival repository. Archivists may not give tax advice and may not appraise the monetary valuation of a collection. They should be able to provide your organization with a list of appraisers who can (for a fee) make monetary appraisals of the materials for the organization. It is the donor organization which arranges and bears the cost of any such appraisal.

Monetary Donations

Most archives are not-for-profit institutions. Arrangement and description of a collection is the most expensive operation in a repository. Organizations which are able to assist repositories by making grants to help defray the costs of arrangement, cataloging, and conservation of their donations of records are encouraged to do so. Some archives require financial assistance to maintain a collection.

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Contact the Oregon Historical Society

If you would like to discuss the donation of organizational records or any other library materials, please contact:

Shawna Gandy
Interim Library Director
503.306.5265
Shawna.Gandy@ohs.org

Please contact us first before bringing materials to the Oregon Historical Society.

If you would like to donate artifacts only (such as furniture, dishes, paintings, costumes, watches, etc.), please contact:

Kim Buergel
Registrar
503.896.5140
Kim.Buergel@ohs.org

For information on the Oregon Historical Society and our collections, please visit our website at www.ohs.org.