

## Guide to Donating Archival Materials

### Choosing the best type of archival repository

When deciding where to donate your materials, there are many things to consider. Different institutions have unique collection goals and missions depending on the community and the patrons they serve. For example, museums and public libraries are more public-facing than universities or colleges because they have frequent exhibits and programming for civic engagement. University and college libraries mostly focus on teaching and education to serve the students, faculty, and staff associated with their institution. **You can usually find more information about the values and goals of an archival repository on their website.** For example, the [United States National Archives](#)' vision is to provide "cutting-edge access to extraordinary volumes of government information and unprecedented engagement to bring greater meaning to the American experience." On the other hand, the [National Museum of African American History and Culture](#) strives to provide "an opportunity for those who are interested in African American culture to explore and revel in this history through interactive exhibitions." While the goals of these two repositories are similar, there are differences due to the nature of their institution's purposes and visions.

### Housing and access

Once you have decided on the kind of institution to donate to, you should look for a repository that has proper housing and storage for your materials. While most archival repositories do have professional housing and storage, not all of them have the same amount of resources, and the kinds of available space and equipment will vary from one institution to the next.

- The institution should have **cool, dry, temperature- and humidity-controlled rooms** with enough **acid-free** folders and boxes to protect your materials. You should also think about the specific materials in your collection to determine what resources may be necessary to house them. For example, if your collection is largely digital, it is important to know what software and digital storage the repository has available to ensure the best quality preservation for those files.
- **What kind of access can this institution provide to your donated collection?** Think about the audience the institution serves, which can include students, faculty, researchers, or the general public who may be curious about historical topics. While archivists cannot dictate the purposes for which your donated collection will be used, each institution has different missions and values that serve certain groups of people on different levels.
- **Some repositories are more available than others** and may require fees or appointments to use and research within collections. Sometimes a repository has an off-site storage location which means that certain materials will require more time and transportation to be accessed.

- **Ask about physical accessibility** parameters such as ramps and elevators, captions for videos to serve those that are deaf or hard-of-hearing, voice descriptions for those that are blind, as well as access options for online and digital resources for those that are vision-impaired. These are important for providing universal access to archival materials.
- **Accessibility of finding aids and catalogs are also critical** as they allow researchers and other users to know if a certain collection is relevant to their search. Think about and evaluate the finding aids format(s) and the language the repository uses to describe a collection. You may wish to ask about how long it typically takes to process and provide a finding aid for a collection given an institution's capacities, which are usually dictated by the number of staff members, including trained archivists and conservators, the institution's budget for the archival supplies required for **processing**, and capacities for maintaining adequate housing environments. Collections are often not available to researchers right away, and it can take many months or even several years before they have been processed fully and are open for research.
- **Security from theft.** When an institution houses particularly valuable collections, they must put security measures in place to ensure the safety and longevity of materials for which they are responsible. Some institutions hire security guards for their reading rooms, others keep track of visitors with registration forms requiring valid photo identification, and most repositories prohibit bringing backpacks into the reading room, providing lockers for personal items instead. However, **it is important to note that these security measures will affect different groups of people in unique ways.** Some university libraries are not open for use by people outside of their community, and may only be patronized by students, faculty, and staff. If access is prohibited to those in the broader community, security guards will turn them away. Consider whether the population most interested in your collection would be excluded, especially Black and Indigenous people of color. **You should think about who you want to have access to your collection at the institution of your choice, and whether their security measures will prohibit or discourage access to some groups of people.**

#### Finding the right fit

Most importantly, a repository will only accept your donation if it fits within their collection policies and goals. Archivists consider which histories are already represented in their collections and which ones are missing when deciding whether to accept a collection. You can do a bit of digging into this yourself if the institution in question has their finding aids or catalogs online. This is also often where you can find collection policies and guidelines to learn about the general scope of that specific repository.

*Think about your own collection and what it represents. Some questions to ask yourself include:*

- Who made the materials in the collection? Why, where, and when were they created?

- What are the materials in the collection (letters, memoirs, e-mails, diaries, blogs, scrapbooks, speeches/lectures, articles/essays, legal documents, minutes/reports, brochures/fliers, awards/certificates, photos, posters, audio-visual tapes, CDs/DVDs, records, objects, websites, etc.)?
- What story does this collection tell? What topics are covered?
- How big is the collection? Will you continue to add to the collection (keeping it open), or will it be closed (not accepting more materials)?
- How organized is the collection? How long will it take to process?

Answering these questions can help you think about how well your collection fits in a certain repository. After reading and asking about an institution's collection policies and goals, you can compare them to your collection to see if it would be a good match.

*Know the questions that archivists ask themselves when considering a collection for acquisition, such as:*

- What are our collection priorities and goals?
- What collections do we already have?
- What do our researchers or patrons want to see?
- Do we have the resources necessary to responsibly preserve and provide access to this collection?
- What condition are these materials in? Have they been damaged by water, mold, or other forms of wear that would require conservation and preservation?
- Do these materials need to be digitized? Are they already digitized, and do they require digital preservation?
- How organized or processed is this collection? How long will it take to complete processing?

### Negotiating and signing the deed of gift

Once you have decided on an institutional home for your collection, you can begin the process of negotiating **the terms on which you will donate the materials**. Before doing so, you may want to have an on-site monetary appraisal done by a professional appraiser while consulting with an accountant or attorney. Archivists and curators cannot provide a monetary appraisal for you, only a professional appraiser can. (This step is important because your donation may be eligible for tax deductions.) Most archival repositories either cannot or will not pay for collections and usually rely on donations. You can also ask an attorney about whether it is best to **deposit or loan your collection to a repository**. Depositing means you will transfer your records without transferring the **title**, or ownership, while loaning a collection indicates a temporary transfer of materials.

Next, you will **agree on terms with the institution with a deed of gift, or contract, that transfers the ownership of the collection** and covers the collection scope, ownership, intellectual rights, transfer schedule, archives' rights, payment for shipping, and more. Any

refusals or removals of the collection will be indicated in this contract along with a plan for either disposing of or returning materials that are rejected by the institution.

**You can place restrictions on access and use**, especially if there are any confidential records such as student records, tax documents, medical records, legal papers, and more. Often, repositories have their own policies on dealing with sensitive data and documents that reveal personal identifying information such as social security numbers and bank account numbers. While archivists strive to provide as much access as possible to their collections, you can come to an agreement should you choose to restrict access. This can be done on a term basis, meaning that restrictions would expire based on how much time has passed, the death of a named person, or other terms.

Another important aspect of this agreement has to do with **copyright and deciding who ultimately owns the material being donated**. Copyright dictates who is in control of the reproduction, publication, adaptation, exhibition, or performance of the work collected. Usually, this set of legal rights controlling use of the materials lies with the creator of the materials, but ownership can also be transferred to family members or others through a will and testament. Ownership of copyright is not the same as ownership of the physical, material items. Archivists usually prefer for copyright ownership to be transferred to the repository with an acquisition so that researchers may publish their work without having to obtain permissions for use of the materials. More information on copyright laws can be found [here](#).

### Preparing to transfer your collection

When preparing your collection for transfer to a repository, and afterwards during processing as needed, you may be asked to **help identify the people documented in it or the context in which items were made**. This will allow archivists to accurately process your collection and make it as discoverable and accessible as possible.

In the process of digital transfers of material on computers, disks, or other digital storage software, it is important to remember that there may be passwords, browsing history, other user files, or copies of deleted files remaining. Also, as technology continues to advance quickly, digital storage is always changing, so **if you have specific questions about digital archives and their transfers, you should contact the archivist at your chosen repository**.

If you feel so inclined, and/or are able to do so, you can make a monetary donation to the repository now housing your collections to help with its preservation and accessibility.

### Conclusion

The BMRC is committed to connecting those who document, share, understand, and preserve Black experiences. With this resource, we hope to provide guidance for those considering donating their collections so that the legacies of Black people in the Chicagoland area can be archived. While we remain neutral in recommending institutions for you to donate to, we can connect you to repositories that you might keep in mind when considering donating your

collections. In this way, individuals, institutions, community organizations, and others dedicated to archiving Black history can come together to preserve the experiences and works of the Black Diaspora.

#### *DO...*

- DO provide context to the materials, like names of people represented, stories behind materials, etc.
- DO research an institution or repository before contacting their archivist about a potential donation.
- DO hire a professional appraiser or accountant for help with a potential tax deduction for your donation.
- DO ask the archivist questions about housing, storage, preservation, and access protocols at the institution.

#### *DON'T...*

- DON'T just drop off a collection at a repository without first consulting with their archivists.
- DON'T rearrange or remove materials after signing the deed of gift without consulting with the archivist at the repository of your choice.
- DON'T ask an archivist or curator for an appraisal.
- DON'T insist on unnecessary restrictions to access of your materials when signing the deed of gift.

#### Additional Resources

Links:

[Library of Congress So you want to donate your documentary collection to an archives?:  
https://blogs.loc.gov/folklife/2018/01/so-you-want-to-donate-your-documentary-collection-to-an-archives/](https://blogs.loc.gov/folklife/2018/01/so-you-want-to-donate-your-documentary-collection-to-an-archives/)

[Society of American Archivists Donating Personal or Family Records:  
https://www2.archivists.org/publications/brochures/donating-familyrecs](https://www2.archivists.org/publications/brochures/donating-familyrecs)

[Society of American Archivists Donating Your Organization's Records:  
https://www2.archivists.org/publications/brochures/donating-orgrecs](https://www2.archivists.org/publications/brochures/donating-orgrecs)

[Margot Note Consulting Donating Your Family Archives:  
https://www.margotnote.com/blog/2019/05/13/donate-your-family-archives](https://www.margotnote.com/blog/2019/05/13/donate-your-family-archives)

Videos:

[New York State Archives' Donating Your Materials:  
https://www.youtube.com/watch?time\\_continue=114&v=rmMQdnKwi5I&feature=emb\\_logo](https://www.youtube.com/watch?time_continue=114&v=rmMQdnKwi5I&feature=emb_logo)

[South Peace Regional Archives' Create a Family Legacy:](https://www.youtube.com/watch?time_continue=20&v=1ZSycchRpbG&feature=emb_logo)

[https://www.youtube.com/watch?time\\_continue=20&v=1ZSycchRpbG&feature=emb\\_logo](https://www.youtube.com/watch?time_continue=20&v=1ZSycchRpbG&feature=emb_logo)

### Key Words

- **Acid-free:** paper that is distinguished from those that have residue from the acids used to break up wood fibers during its manufacture. Residual acid will destroy the paper fibers and make the paper more brittle over time. Preservation includes measures to minimize this deterioration as much as possible.
- **Archives:** records made or received by a person, family, or organization that are preserved because of their historical and continuous value.
- **Deed of gift:** an agreement transferring title to property without monetary compensation. May be for real, personal, or intellectual property. Deeds of gift are usually contracts that establish conditions for the transfer of title to documents and placing any restrictions on access/use.
- **Finding aid:** a document describing the contextual and structural information about an archival resource or collection.
- **Historical significance/value:** the importance or usefulness of records that justifies their preservation because of administrative, legal, fiscal, or evidential information that helps with understanding the human past. This is not about whether the person, people, or organization that created the collection were/are famous, but about how they have contributed to their communities. Materials do not have to be old or perfectly organized.
- **Intellectual control/organization:** the creation of catalogs, finding aids, or other guides that help researchers locate materials relevant to their interests.
- **Preservation:** the protection of materials through minimization of chemical and physical harm, injury, decay, or destruction to prevent the loss of information and extend the life of cultural property with non-invasive treatment.
- **Processing:** preparing archival materials for use through the arrangement and description of the collection.
- **Repository:** a space or institution that cares for and stores archives.
- **Title:** the rights/privileges to control and dispose of property. Also, legal evidence of ownership.

These and more definitions are available at the [Society of American Archivists' Dictionary of Archives Terminology](https://dictionary.archivists.org/index.html): <https://dictionary.archivists.org/index.html>

This resource was created by Tanya Calvin, BMRC Community Engagement Archivist, 2020.