

Chapter 2.3 Video Transcript
What You Need to Know:
COLLECTING HISTORICAL MATERIAL

So now, we'll shift to talking about how you might collect any historical material that you want to add to your collection. Here are some tips to consider, as you plan out your approach:

Pick a time of year when your organization is less busy.

For example, if you have a full schedule of performances or events in the spring, consider doing any publicity or communications work when your organization members will be together—maybe spring or summer?—and save the collection and cataloging work for the winter.

If you already have material, start from what you have, and practice and refine the steps with one part of your collection.

One of our field-test groups had two members with bags of material at their homes. They decided to get material from one of the members first, triage it, get gift agreements, and see what they learned about the process. Then they planned to do the same with the next member, again using it as an opportunity to try out and refine their process before soliciting donations more broadly.

Try to involve others from the start.

In the planning chapter, we suggested some different roles that people might take on:

- one or two people in the role of talking to your community and gathering material for the collection;
- someone in charge of managing the steps in the spreadsheet;
- 1 or 2 people to help with data entry;
- 1 or more people to help create transcripts or captioning any recorded conversations.

Be ready for your thinking about your project to evolve as you get further into it.

In the previous chapter, we pointed to those planning questions that needed a decision early on in your process but also acknowledged that your thinking will likely shift as you start work on your collection. Initially, you likely will have ideas about whether preservation or access or education is most important to you, or some combination of those, and those choices will influence your decisions about what to collect. However, as you start to collect material, your

purpose may become broader—or more narrow! And that’s fine—you can make this collection whatever you want it to be.

Your process will also evolve as you get further into it.

It is not at all uncommon to start with larger aspirations than you find you can reasonably do with the time and people available. Creating archival collections is a matter of choosing trade-offs, and constantly reviewing priorities, and that’s normal.

As an example, in our collection, we started out with the intention of putting a unique identification number on everything we collected. We soon realized this was impossible—we just didn’t have the time—and we had to re-evaluate how we structured our organization system. We started setting some limits on quantities of material we were taking in. And we started distinguishing between material that we could group together in a folder versus those items in our collection that we wanted to number individually, to make them easy to find. For example, we gave individual numbers specifically to recorded conversations or to special items in the collection such as a particular historical photo or our letter from the British prime minister’s office. Other items—such as administrative records, booklets or groups of photos from a particular year—we put in folders and just gave the folder its own number. The message here is that our process changed as we got further into our work, to keep it manageable for our situation.

So now, let’s talk about one more key step that needs to happen after you receive a donation, and that is getting a signed gift agreement.

Why do you need one?

Because your collection will be public, you’ll need to have a record of your agreement with the donor that documents their permission for you to use their donated material as part of your archival collection.

This is especially critical in the digital world where it’s so easy to share material. So, these gift agreements are really important documents to get from your donors, and important to keep track of, once you have them.

And what should be in it?

We’ve provided a copy of our sample gift agreement as part of the PDF for this chapter, and we think that that works pretty well, but you’re welcome to revise this if you wish for your own

purposes. You can present it to the donor in paper form for them to sign, or—for people who are comfortable with technology—there are a number of digital tools for completing forms online that you may prefer to use.

Gift Agreement

The undersigned agrees to donate the following materials to the archival collection of **[your organization's name here]**

At the top of your agreement is a place to list all the materials that have been donated. It does not have to be an itemized list but should provide information about rough quantities and what type of material was donated. For example, you could list that I gave you posters for 1990-2005; 18 color photos; name buttons for 2018, 2019 and 2022; a box of committee meeting records; and 2 videos of show dances in 2010.

We suggest you fill this section in for the donor before you give them the form. In our experience, when donors were left to complete this section on their own, they had so many questions about how to do so that it was just easier for us to fill it in for them. We could then list the elements of the donation in a way that would be useful to us for reference.

I agree to transfer ownership of these materials to the **[organization or person that will hold the materials].**

For any materials that I created, I retain the copyright. I hereby grant the **[organization or person that will hold the materials]** a non-exclusive right, with no restrictions, to make these materials publicly available for non-commercial research, scholarly, or other educational purposes as long as attribution is given to the creator of the materials. If someone wishes to use the materials that I created in a different public format or for commercial purposes, they must contact me for permission.

(Name of copyright holder) _____

(Contact info for copyright holder) _____

In the next section, there are two checkboxes: one of them addresses ownership of the materials and the other addresses ownership of the copyright to those materials. So here, we need to pause to clarify the difference between those two things and say a few words about copyright.

It's easiest to begin with an example. Let's say you've received a donation with a great photo of two dancers that was taken by a friend of the donor; so, the donor is not the photographer. While the donor owns that physical copy of the photo, the friend who took the photo actually owns the copyright as the creator. The same is true if you've been given a copy of a digital photo; the donor owns the particular digital copy in their possession, but the photographer owns the copyright to the photo.

So why does copyright matter? Copyright is intended to protect original creative and expressive works from unauthorized use and distribution by others who are not the creators. The basic idea is that if someone who is not the copyright holder wants to use the copyrighted material in some way, they need to first seek permission from the creator, especially if that use involves making money in some way.

In the U.S., there are certain circumstances under which anyone is allowed to use limited portions of copyrighted material without seeking permission of the creator; those circumstances are 1) for commentary; 2) for criticism; 3) for news reporting; and 4) for educational purposes. In the US, this is called the "fair use doctrine," and it's part of American copyright law.

So, someone can donate to you any materials in their possession and can grant permission to use them in your archival collection. People are then free to use them in any one of those four "fair use" ways.

However, if someone came to you and asked to use material from the collection in something they were going to create and make money from—such as a book or a website or a documentary—they would probably need to seek the permission of the copyright holder.

Please note, we're not copyright law experts, and are just offering some general guidelines for creating a gift agreement. There are also more nuanced permissions you can grant in relation to copyright that we have chosen not to get into here. If you have questions about copyright use, we suggest you consult the Internet or your local library! In particular, you may want to explore Creative Commons dot org.

So, in our version of a gift agreement that we share with you here, we include a statement that says the donor is agreeing to transfer ownership of these materials to whatever organization or person will hold the materials, and you'll need to fill in who that organization or person is. If you're keeping the materials within your own dance or music organization, list the name of the organization. But if you are planning to give your materials to an existing organization that

keeps archival collections (such as your local history museum or library, or the American Folklore Society), put that organization's name in here.

The next checkbox addresses copyright: it begins with the sentence, "For any materials that I created, I retain the copyright" and then it goes on to list some rights that they will grant to make the archival material available. If your donor is not the creator of the materials they're giving you, they can just skip this checkbox. Basically, if they didn't create it, they can't speak for the copyright holder. However, if they ARE giving you something for which they are the creator, you'll want to keep track of who the rights holder is for each of these items or files.

You are certainly free to choose different wording for this paragraph if you wish. We should add that you can also set up different conditions around the ownership of the copyright, but that sends us down a long rabbit hole about copyright that we won't follow here. If you want to find out more about this, we suggest talking to someone in your community involved in publishing or contact your local friendly reference librarian!

(choose and initial one of the following)

Items in the donated materials that are not retained by the Archive should be (check one):

Returned to the donor Disposed of by the Archive (may include disposal or donating to a more appropriate repository)

The next section asks the donor to stipulate what you should do with any materials that you decide you don't want in the collection and gives a choice of having the materials returned to the donor, or disposed of by the caretaker of the collection, noting that disposal can also mean donating to a more appropriate archival repository.

As an example, let's say you're given five copies of a poster for a Morris dance event, and you're only planning on keeping at most three copies of any posters, so you don't need the additional two. Make sure your donor understands that they can choose either to have any unaccepted material returned to them, or they can direct you to recycle it, throw it away, or to pass it along to another appropriate recipient.

(signatures)	
Donor Signature	<input type="text"/>
Donor Printed Name	<input type="text"/> Date <input type="text"/>
Donor Phone or Email	<input type="text"/>
<hr/>	<hr/>
(Signature of Person Accepting the Donation)	(Date)

The last part of the gift agreement is the signatures. Have your donor sign and print their name, date, and give you their preferred contact information, in case you have a question later on. Make sure whoever is receiving the donation signs and dates the document as well.

What if your donor comes back to you later with more material to donate?

Do you need to create an additional gift agreement, or can you use the one you’ve already got? This happened to us in a number of instances, and here’s what we suggest: if the new material is being given to you under the very same conditions as the original gift agreement, then simply amend the list of materials in the original gift agreement, write the date next to the amendment, and have the donor initial it.

However, if the conditions are in any way different, then you should create a new gift agreement.

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OK! Now you’re ready to move to the final video in Chapter 2, “Using the Spreadsheet” where we’ll introduce you to the spreadsheet that we’ll be using throughout this toolkit to do two things: to track the steps of this process, and to store information about the materials in your collection.