

CDSS Archiving Toolkit

Chapter 2 Resources

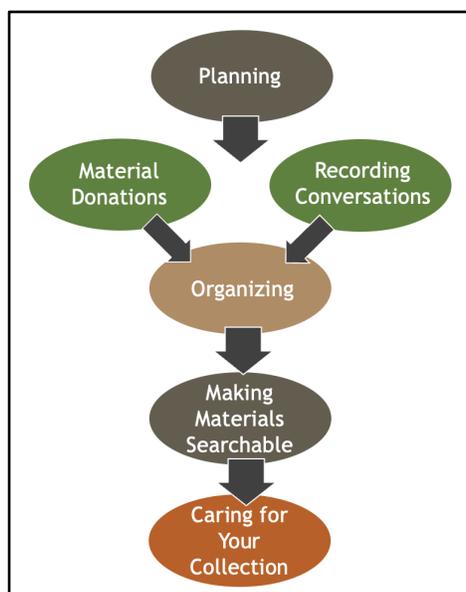
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Chapter 2.1 Video Transcript

Intro:

SETTING UP A SYSTEM TO RECEIVE DONATIONS

Welcome to Chapter Two: Setting Up a System to Receive Donations Let's review where we are in the process.



In Chapter 1: Planning for Your Archival Collection, we talked about deciding to create an archive, gathering a team, agreeing on goals, and creating a plan. And you've done some thinking about what kind of material you want to include in your collection. So, you're going to be in one of three categories:

- 1) You've got all the material you need or want already, and you're not actively seeking any more material for this collection; or
- 2) You've got some material, but you want to seek out additional material to add to it; or
- 3) You're starting from scratch in seeking out and collecting material for your collection.

If you're in the first category, and you're not really going to be looking for or accepting any new material, then you can bypass this chapter and move on to Chapter 3. But if you're in either of the other two categories, then this chapter is for you!

As you start to gather material from your community for your collection—whether to add it to existing material you already have or to begin a new collection—there are ways to do so that avoid any potential difficulties as you go along. In the first of the next three videos in this

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chapter, "Communicating with Your Community", we'll help you understand that part of the process and what to communicate to people you're collecting from. In the second video, "Collecting Historical Material", we'll provide some advice on how to go about collecting material, and we'll talk about gift agreements. In the final video, "Using the Spreadsheet", we'll help you understand what to keep track of as you collect material, and we'll offer a system you can use or adapt to keep track of it all using a spreadsheet.

And look for the Chapter 2 Resources PDF that provides transcripts of each of the videos as well as summaries of key information and templates for your use.

So, let's begin!

Chapter 2.2 Video Transcript

What You Need to Know:

COMMUNICATING WITH YOUR COMMUNITY ABOUT THIS PROJECT

Do either of these situations sound familiar to you?

In Situation #1, a folk dance team has one member who, for a number of years, has been that person that saves material from the team's activities over the years. It lives at home in one of their closets, and they may or may not have put some moderate organizational structure on it, so they can find things, at least at a very top level. (For example, they may know where the photos from the 1990's are, but that may be about as much detail as they can provide.) They realize that they can't do this forever and would like to pass on this role to someone else in the group. At the same time, the team decides to round up various other historical material that other team members may have and collect it all in one place.

In Situation #2, a folk song organization realizes that some of its treasured older members are aging, and they want to formally gather together what knowledge and resources they can from these elders before it's no longer possible. While many people in the organization have benefitted from learning a wide repertoire of songs, there is no formal centralized collection of songs, lyrics, and historical information held by the organization, so the organization's members decide to create an archival collection of this material.

Perhaps you're an organization that already has a core of material that you'd like to add to, as in Situation #1. Or you may be an organization that is just starting from scratch in gathering archival material, as in Situation #2. In either case, the place to begin is to develop your list of talking points to communicate to anyone from whom you might want to gather material. You may find that people donating material to your collection have a number of ideas about what archives are and how they work, and not all of their information may be accurate.

So, to avoid hitting any one of a number of snags later in the process, we'll lay out a set of talking points framed as answers to some key questions; you can find this list of talking points in the Chapter 2 Resources PDF for this chapter.

Question: What is your archive project? Why are you doing it?

First of all, give people some background and context for this archival collection's purpose. Let them know who is spearheading this effort to create the collection, and why you are making an archival collection. Are you hoping to preserve a team's history? Are you hoping to capture the stories that

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embody people's experiences with your organization or at your events over the years? Do you want to create a home for all the photos, slides, or videos that people have created over the years to illustrate these events? These questions, and others about your purpose were part of what you thought about in Chapter 1. Think about how you want to share that information with potential contributors to this collection.

If you have received any funding from various sources, it's important to acknowledge those sources and explain their interest in your effort.

Here's one example:

A folk dance team wanted to get the rest of the team on board with the archiving project, so they created a 2-page vision document outlining what the project would be, and why they were doing it. They were then able to have a larger group conversation about it at their general meeting, and at subsequent evenings at the local pub after practice.

Question: Once the collection is created, how will people be able to see it or use it?

Let people know how they will be able to access the collection once it's created. Will your collection live in a closet at the home of one of your team members? Will you create a website? Or will the materials be given to a local historical society or a library or an archival repository? Or will your collection be purely digital? And how will people be able to access the digital parts of the collection? Whatever the destination of your collection, make that clear to your donors.

Sometimes people have items they value highly that they would be willing to donate to your collection if they know that the items will be cared for properly. This can be especially true if people have items that are historically significant, one-of-a-kind, or fragile in some way. In this case, you may want to talk to those potential donors about how their items will be cared for. Do you plan to store material in archivally safe boxes, or sleeves? How can you assure them the materials will be safe from dust, damage, or loss? In our experience, we had several donors who were happy to donate material once they knew that there would be someone overseeing its preservation.

Question: What kind of material are you seeking for your collection?

If you are hoping to round up additional material to add to what you have, that's important to tell people. You may want to describe what kinds of material you've already got, and what gaps there are that you're hoping to fill.

For example, in our collection, we wanted to fill in gaps for some of the material that would have been generated each year, such as t-shirts, posters and lists of team members who

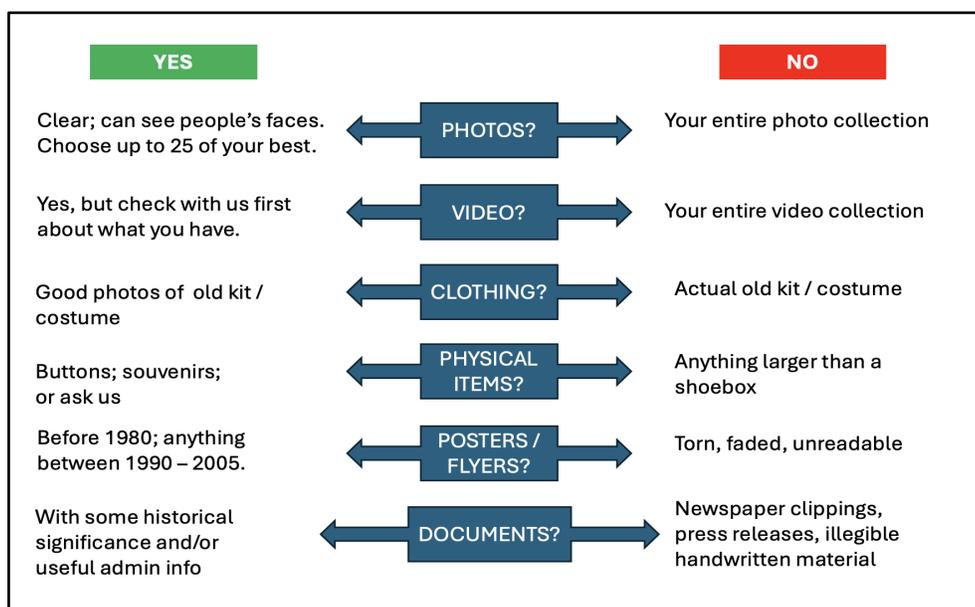
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attended that year. So, we posted a public Google doc that listed each category, what we had, and what we were still seeking. From that, various donations started to trickle in and fill in our gaps. And when people asked what we needed, we could easily point them there.

For any material that you want to collect, it's useful to have a prepared list of the kinds of material you are seeking and as part of that list, be clear about what you are NOT accepting into the collection. You may not want to receive *everything* someone has, so share with them any limits you're setting on how much material they can donate.

For example, to make sure they got the kinds of photos they wanted, one group described what they considered a "good" photo for the collection. Instead of prioritizing artistic composition, they wanted photos that either showed faces clearly or helped them identify a particular dance the group had performed, or that gave the best feel of a particular event or had some kind of historical significance. These were more important to them than the most beautifully composed photos (although beautiful composition was certainly a bonus!). They put this information on their website with several examples to illustrate what they were asking for.

Here's another example that tries to clearly articulate, in the "No" column, what items are not being collected.



If someone wants to give you digital files, ask what formats they have. If they have a higher quality format, ask to get that from them. We've provided a reference chart for you that summarizes what these preferred digital formats are.

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In the next chapter, we talk in more detail about these higher-quality formats that are best suited for archiving digital material.

You'll also need to let potential donors know that you may need to decline certain materials in certain circumstances. For example:

- if a physical item is moldy from living in a basement or an attic, don't accept it. Mold can easily spread to other items in your collection.
- Newspaper clippings can turn regular paper yellow when they're stored in the same folder, so maybe you don't want to accept newspaper clippings. Or if you do, consider scanning a copy and keeping the scanned copy. This is one of the few times we'll suggest keeping a copy rather than keeping the original.
- You may also need to decline materials if there are any serious privacy issues with the donated material. For example, stories about other people that share some personal information that they may not want to make public should raise a red flag for you. Keep an eye out for anything that may feel like it's treading on personal privacy and use your best judgment about whether that material can and should be made public.

For any of the material you collect, it's helpful to get as much information about it as you can when it's donated. Especially for photos, videos, or slides, what can you learn about places, names, dates, or locations? For documents, printed materials, or physical objects, what can the donor tell you about the context for the item? This information will be great to add in later as you catalogue the material.

Question: Will you accept loans of material, or only permanent donations?

What you say here to your donor will depend on what decision you've made about accepting or not accepting loans of material. In either case, it's important to clarify your decision with your donors. If you're only accepting donations, then make sure they understand that this donation is considered permanent. If you *are* accepting loans, then review with your donors what agreement you're making about how and when they can request a return of their materials.

Question: If I decide to donate material to you for the collection, how does that work?

First, let them know that you'll review their donation once they give it to you and just make sure everything is in acceptable condition.

Next, once you've reviewed the donation and determined you will accept it into the collection, you'll give your donor a "gift agreement" to sign. (We'll go over our sample gift agreement in detail in the

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next video.) This gift agreement provides a written record of the donation and the permissions that the donor is granting you to make the material publicly available.

They will then sign and return the gift agreement to you, and then you'll start work on organizing the collection. Once it's all organized, it will be available for them to view.

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So now we've addressed the content of what you need to communicate to donors.

Next, we'd like to share a couple of lessons we learned as we talked with our dance community.

Lesson #1: There's a LOT of information here—spread it out over several conversations, if you need to. Even though we've summarized all the talking points together here in one video, that does not mean that you need to have a single conversation with your donor in which you share all of this information in one sitting. You certainly may want to put a lot of this information on paper for people, but following up with a conversation is really, really helpful.

AND

Lesson #2: Use a variety of means to get this information out to your community and say it multiple times. In our experience, we needed to reach a very large population of Morris dancers attending an annual Ale, so we created several short YouTube videos in which we shared the context for the collection and what materials we could accept, just to give them an overview of what this project was, and then we shared the link to those YouTube videos through social media, emails, and information the teams received when they arrived at the Ale. We released the first video in 2022, then released a follow-up video in 2023 that included some images of what we had already received for the collection, hoping to build some interest, and keep it fresh in people's minds. If you'd like to see our videos, we've provided the links in the Resources section, or you can search YouTube under "Marlboro Morris Ale Archive."

Then, we had the conversations about signed gift agreements with individual donors at the time they needed to sign the agreements.

So be creative in how you convey this information and do what's best for your community and your situation.

Lesson #3: Balance your use of electronic communication with face-to-face conversations. On the one hand, it's most efficient to reach a large number of people by sending out emails, publishing videos, or posting information on a website. However, as we did all this over a couple years, we still

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found that many folks had a few misconceptions about what we were doing. We found our most effective communication happened when we talked to people in person, whenever possible.

So, we strongly recommend, especially when you get to the information about the gift agreement, that you have that conversation face to face—whether in person or virtually—and not through a lengthy email. People often have questions that are best addressed in the moment, and the conversation will give you an opportunity to see what they understand and whether they have any misconceptions that you need to address.

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If you're planning on trying to round up historical material that may be out in your community, or to begin collecting material from scratch, the next video, "What You Need to Know: Collecting Historical Material", will talk about how to go about doing that. Also in the next video, we'll talk about how to create and use gift agreements.

If you're not planning to collect anything further beyond what you already have, you can move on to the last video, "Using the Spreadsheet".

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

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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

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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.

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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

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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.

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(signatures)	
Donor Signature	<input style="width: 100%;" type="text"/>
Donor Printed Name	<input style="width: 70%;" type="text"/> Date <input style="width: 20%;" type="text"/>
Donor Phone or Email	<input style="width: 100%;" type="text"/>
(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.

Chapter 2.4 Video Transcript: USING THE SPREADSHEET

Welcome to Chapter 2: Using the Spreadsheet. If you haven't already watched the two "What You Need to Know" videos, please watch those first before watching this one.

Once you start gathering material for your collection, you'll need to track the steps of taking in and organizing it all. In this video, we will introduce the spreadsheet that we used throughout the process of building our collection. We decided to use spreadsheets, because of their flexibility in how you can easily organize, sort, and re-sort your information. This is something you'll need to do with your collection frequently as you're organizing it.

As you see, there are different sections of the spreadsheet, divided into tabs that you find at the bottom. For now, we'll be looking at Tab 1: Receiving Donations.

Starting on the left in Tab 1: for each donation, start out by listing who the donor is and their contact information in **columns A, B, and C**.

Once your donor gives you their material, use **column D** to record when you receive their donation.

For your physical materials, it's a good idea to attach or write a label on the box or folder or bin that the materials are stored in, especially as more things start coming in and you have more and more materials to keep track of. Keeping the same label on all related material from a donor helps you know who donated what to you, in case you have questions further in the process. You're going to put the same label on any boxes or bins and any digital folder you need to create. We suggest you create a label with the donor's last name and the donation date, and enter that label in **Column E**.

These boxes, bins and folders are what we'll refer to as the donation's "**temporary storage**."

Once you receive material, you're going to take a first pass through the donation, the first of two passes through the materials that you'll do. The purpose of this first pass is to familiarize yourself with what's in the donation, make sure anything physical is in decent condition, and to ensure that you can open and read any and all digital files. As we go through Tab 1, we'll explain the steps of this first pass.

The second pass, that you'll do in Chapter 4, is for the purpose of getting the material into its permanent archival storage and getting it organized and labeled. We'll talk about this in greater detail in Chapter 4.

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Column F in the spreadsheet says “Appraise physical items.” In general, this means going through anything physical that you’ve received to check what condition it’s in, and whether there’s any damage to it that requires any special care or preservation steps right away. Later in this process, you’ll be storing material in archival quality folders and boxes to help preserve it, but for now, in this first pass, you’re doing triage on anything that needs immediate care.

So, let’s start with a checklist of what you can do to appraise various kinds of physical items. (You can find this checklist in the Chapter 2 PDF.)

- Keep an eye out for anything that may feel like it’s treading on personal privacy. Pictures or video that might be embarrassing to someone else should be treated carefully and not made public.
- You may want to keep no more than three copies. It’s nice to have a master copy then have 1-2 other copies in case you ever want to physically display them. Then if anything happens to your display copies, you’ve still got the master copy.
- Check for tears, mold, or yellowing. If you see mold, it is best to remove that paper from your collection since mold will spread and contaminate everything it touches.
- Carefully remove any rusty paper clips or staples from any documents.
- Look for fragile documents. You can put cardstock or lightweight cardboard underneath the document for support, then enclose them in a plastic sleeve of some kind for protection.
- You want to store the papers so that they are upright or lying flat. What you want to avoid is storing papers so that they slouch or bend. A tip here is fill in empty space around file folders with bubble wrap or packing paper to help support them.
- Check for adhesive on the back of photos! You can store photos together in a folder, but only if there is no adhesive on the back or the front. If you do feel some adhesive, you can enclose photographs in a plastic sleeve of some kind to isolate the photo and protect the other photos around it.
- If you have loose slides, gather them together in a box or in a clean ziploc bag. You just want some kind of container that will protect them from dust, scratches, or fingerprints.
- Since newspaper causes other paper to yellow over time, pull out any newspaper that you’ve decided to keep and put it in a file folder, away from any other paper donations.

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Remember that you can choose to get rid of the newspaper if you scan the material first and keep a digital copy.

- If there are any books or booklets that are folded open on their binding, close them in order to keep the binding intact. As with paper, store books or booklets either lying flat or upright-and-supported, so that they are not slouching or bending in any way.

Once you've done all your appraisal steps for your physical materials, check off this step in Column F.

Next, let's continue the checklist with digital files.

In **Column G**, now you are going to appraise the digital donation. "Appraising" digital files involves a slightly different set of steps but still has to do with checking the condition of the donation.

So, for each digital file that you've received, make sure you can open the file and read it. Given the speed with which the digital world updates itself, you may find that older digital donations will be in formats which are now obsolete. If you can't open a file, try searching for other applications that can open the document. If that works, convert the old format to a new format, and save the updated files.

If you still can't open the file, you may need to talk to your donor to see if they can provide the file to you in a different format.

Once you've done all your appraisal steps for your digital materials, check off this step in Column G.

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The last part of the process of receiving and tracking a donation has to do with gathering written permissions from your donor to make their material publicly available as part of your collection. So, we'll talk about these final steps in Columns H, I and J.

When you send the gift agreement out to your donor for them to sign, check off Column H. Once you've received it back from them, check off Column I.

Last but not least, we strongly recommend that you print a physical copy of your gift agreement and file it, and that you then also file a digital copy of your gift agreement. Why? Because this gift agreement is critical to your being able to share this material publicly, so creating back-up

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copies in both physical and digital forms seems prudent. And because we're archivists, we feel safer with some redundancy; it's better to be prepared!

That said, you may decide to just keep digital copies, and if so, please make sure that you have multiple back-ups in different locations. Current best practice is to have at least three copies of a digital file, spread out between physical drives and the Cloud. In our experience, we chose to have one copy on a computer, one on a separate hard drive, and one in online Cloud storage.

Once you've filed your signed gift agreements, check off Column J.

And with that, you are done with your first pass through your donation! These steps have given you a chance to get more familiar with what's in a particular donation of material, to check on the condition of the materials you've received, and to ensure that you can open and read all the digital files.

Next, you're ready to go on to Chapter 3 and start with our introduction to Recording Conversations.

Chapter 2.2 Summary

What You Need to Know:

COMMUNICATING WITH YOUR COMMUNITY

TALKING POINTS

Background and Context - What is your archive project? Why are you doing it?

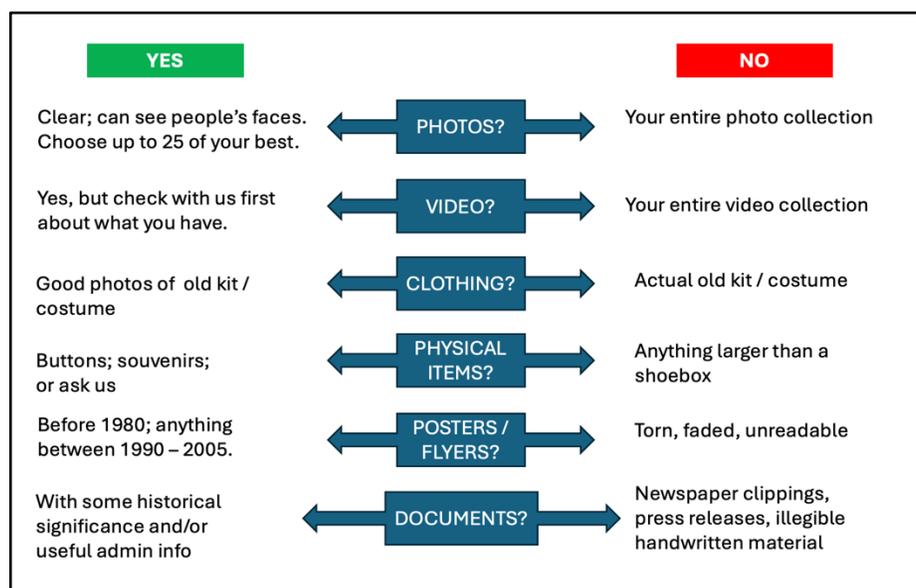
- Who is behind this effort to create the collection?
- Why are you making an archival collection?
- If you have received funding, who from? And why are interested in your archival collection?

Access & Care - Once the collection is created, how will people be able to see it or use it?

- Where will the physical part of the collection be stored?
- Where will the digital part of the collection be stored?
- How can people get access to the collection?
- How will donations be cared for and where will they reside?

Accepted Materials - What kind of material are you seeking for your collection?

- What kinds of materials are you accepting into your collection? Prepare a list of the kinds of material you are seeking for your collection AND what you are NOT accepting.
- Are there any limits on how much material they can donate or that you can accept?
- Are there any privacy issues among the items in the donation?
- Do donors have to organize their collection before donating it?



One example from the video

CDSS ARCHIVING TOOLKIT

A Loan or a Donation?

It is important to let your donor know:

- Whether or not you accept loans. If not, emphasize that a donation is permanent.
- We recommend not accepting loans. However, if you do decide to accept loans, agree on how and when the donor may request a return of materials. And put this in writing for both you and the donor.

Donating Material to the Collection - If I decide to donate material to the collection, how does that work?

- You'll review the donation to make sure everything is in acceptable condition (see the section on Appraisal below).
- You'll prepare a gift agreement for the donor to sign.
- They sign and return the agreement to you.

APPRAISAL

Condition of the Donation

With **physical donations**, look for:

- Mold
- Rusty paper clips and staples
- Newspaper clippings – separate them from other paper or scan
- Protect vulnerable bindings
- Protect fragile documents and photographs

With **digital donations**:

- Can you open and read the digital file?
- Create a Master copy (least compressed) and an Access copy (compressed for ease of use)

Reviewing the Donation

- Appraise the donation's condition, then accept or reject the donation.
- Either dispose of, return, or recycle the donation, depending on what the donor has indicated on their Gift Agreement.

CDSS ARCHIVING TOOLKIT

LESSONS WE LEARNED WHILE WORKING WITH POTENTIAL DONORS

- **Lesson #1:** There's a LOT of information here – spread it out over several conversations, if needed.
- **Lesson #2:** Use a variety of means to get this information out to your community and say it multiple times. You can create videos, send email messages, and use social media. If you'd like to see our videos, you can search YouTube under "Marlboro Morris Ale Archive."
- **Lesson #3:** Balance your use of electronic communication with face-to-face conversations.

LINKS TO VIDEOS WE MADE FOR OUR COMMUNITY

[Contributing to the Marlboro Ale Archive - Part 1:](https://www.youtube.com/watch?v=5xnJCqmXBAg)

[<https://www.youtube.com/watch?v=5xnJCqmXBAg>]

[Contributing to the Marlboro Ale Archive - Part 2:](https://www.youtube.com/watch?v=O_fXAwF26oI)

[https://www.youtube.com/watch?v=O_fXAwF26oI]

Chapter 2.3 Summary

What You Need to Know:

COLLECTING HISTORICAL MATERIAL

TIPS FOR COLLECTING HISTORICAL MATERIAL

- Pick a time of year when your organization is less busy.
- If you already have material, start from what you have, and practice and refine the steps with one part of your collection.
- Try to involve others from the start.
- Be ready for your thinking about your project to evolve as you get further into it.
- Your process will also evolve as you get further into it.

PERMISSIONS

Gift Agreements

- Why do you need one?
 - The gift agreement provides a written record of the donation and the permissions that the donor is granting you to make the material publicly available.
 - It connects their materials to that permission, should you have to follow up with the donor with questions.
- What should be in it?
 - We have provided a Gift Agreement as a Google doc in the Chapter 2 Resources. You are free to use this a template or change it as you see fit. If you decide to use this Google doc, please **make a copy and rename it** before making any changes.
 - Top section - list of materials being donated. Fill this in for your donor.
 - Next section - checkboxes that address transfer of ownership and permission to use copyrighted materials (if the donor is the copyright holder).
 - Next section - donor checks off whether rejected material should be returned to the donor or disposed of (recycled, thrown out or given to another recipient)
 - Botton section - signatures of donor and person receiving the donation
- If donor wants to give you additional material:
 - 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.

Chapter 2.4 Summary USING THE SPREADSHEET

Our spreadsheet is a Google spreadsheet with viewing permissions only. To use the spreadsheet, **make a duplicate copy for your own use within Google OR download a copy.**

POINTS TO REMEMBER

Temporary Storage

- Keep all the physical material from each donation together in some kind of box or bin and, for now, separate from your other donations.
- Digital files should go in a single online folder.
- Create a label with the donor's last name and donation date and affix the label to boxes and bins and any digital folder you need to create. Enter that label in **Column E**.

A First Pass through the Donation....

- The purpose of this first pass is to:
 - familiarize yourself with what's in the donation.
 - make sure anything physical is in decent condition.
 - ensure that you can open and read all digital files.

...and Later, A Second Pass

- The purpose of the second pass through the donation is to:
 - get the material into its permanent archival storage.
 - get the donated material organized and labeled before integrating the donation into the larger collection.

PREFERRED AND ACCEPTABLE FILE FORMATS

Certain digital file formats are much better for archival preservation than others. If you don't have the preferred format, you can use ACCESS-copy formats for your master.

Please note that the lists of formats for either master or access copies is not exhaustive but includes some of the more common formats you may encounter.

DONATION	PREFERRED FORMAT FOR MASTER COPIES	POTENTIAL FORMATS FOR ACCESS COPIES
Document	.EPUB .PDF/A (or .PDF)	.DOCX .ODT .RTF .TXT
Presentation	.PDF	.ODP .PPT
Photos	.PNG .TIFF	.BMP .JPG, .JPEG .JP2
Video	.AVI .MPEG-4	.MOV .MP4
Audio	.AIFF .WAV	.AAC .MP3