

# Donating Organizational Records

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Prepared by the Society of American Archivists  
Presented by the Oregon Historical Society



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# Donating Organizational Records

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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 the donation of organizational records or any other library materials, including documents, publications, photographs, audiovisual materials, maps, and plans, please contact:

Shawna Gandy  
Library Director  
503.306.5265  
[Shawna.Gandy@ohs.org](mailto:Shawna.Gandy@ohs.org)

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](mailto:Kim.Buergel@ohs.org)

**IMPORTANT:** Please contact us first before bringing materials to the Historical Society building, since we will need to understand what you're offering and discern whether it will be possible for us to acquire the materials. We are unable to accept unauthorized donations and are not available for drop-in appointments.

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

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## Donating Your Organization's Records to a Repository

### Organization Histories Preserved for Community Memory

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—in both physical and digital forms—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.

### What Can a Repository Offer You?

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

### What Documents Should be Placed in an Archival Repository?

Many of the records produced by an organization have longterm 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. Records of defunct organizations are also often of interest to an archival repository.

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## What is Historically Valuable Material?

Many types of material can be valuable to a researcher. A list of these can be found below.

Before records are transferred to an archival repository, an archivist should survey your organization's papers and digital files to determine which materials have enduring 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.

## How Does an Archives Operate?

Archives are run by professionals whose first priorities are selecting and 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 state archives for details about their archival operations. The Society of American Archivists can also provide you with information and suggestions.

## Your Organization's Records Could Have Historic Value

Listed below are some types of records that 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/email of officers
- Data sets
- Directories
- Financial statements
- Handbooks
- Legal documents

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- Memoranda
- Minutes of meetings
- Membership lists
- Motion picture film, videotape, audio recordings, DVDs, and CDs
- 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
- Websites/blogs/social media content

Please note that the above list pertains as well to digital versions of such items. Your digital files should have descriptive file names and a consistent naming convention. Be sure to check your digital files at least once a year to assure you still have access to them. Digital media should be backed up on a regular basis.

All materials benefit from being stored in a cool, dry, and temperature-stable environment.

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

## Donations

An archival repository operates much like a business; in general, it cannot invest materials and labor in the preservation of items that it does not own. Not owning the material severely restricts a repository's ability to care for records properly. Representatives of your organization and the repository will sign a deed of gift delineating the conditions of the donation to the mutual agreement of all involved and documenting the legal transfer of ownership (see also the Society of American Archivists' brochure, "[A Guide to Deeds of Gift](#)"). Some repositories offer the option of placing your organization's records on deposit in exchange for a fee to cover the cost of preserving and servicing them. Such an arrangement is governed by a formal deposit agreement.

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Most repositories are not able to promise that donated material will be used in some specific manner as a condition of accepting the gift. The repository reserves the right to, but 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 to your selected repository at appropriate intervals determined through discussion with the archivist or curator. To assure regular contact, your organization can add the periodic transfer of inactive records to the duties of one of its officers.

The archivist or curator may prefer to capture digital material directly from your organization's computers or servers. If any of the digital material that you wish to donate is stored elsewhere, such as backup disks or thumb drives, other computing devices, networked or cloud storage, or on the Internet, the archivist or curator will need access to these locations.

## Access to Collections

The repository's policies regarding availability, duplication, and publication govern access to the materials in the repository. The archivist or curator should discuss with a representative of your organization the repository's access policies and any special needs or concerns of your organization before completing the deed of gift.

Sensitive material may exist in organizational records. 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 materials truly accessible to researchers, they will agree to reasonable restrictions for a distinct period of time.

Be aware that any digital materials that you donate, including computers, computer disks, and other digital storage media, may contain passwords, web browsing history, other users' files, and copies of seemingly deleted files. Whether or not these files are apparent to researchers will depend on the initial method of transfer and on the repository's access policies and procedures for handling digital material, which may change over time as technology evolves. Discuss any concerns you have about deleted content with the archivist or curator.

## Copyright

Assignment of copyright is a complex matter, and your organization should discuss issues of copyright ownership with the archivist and with the organization's own legal counsel before completing a deed of gift.

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Under the terms of U.S. Copyright Law, repositories may provide copies of items in their collections for scholarly research use. Under the “fair use” exemption, the law permits that researchers may publish portions of an item under copyright. Permission to publish or quote extensively from the material must still be obtained from the copyright holder. To learn more about copyright, see [www.copyright.gov](http://www.copyright.gov), or ask your organization’s legal counsel.

## 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 cannot give tax advice, nor are they permitted to appraise the monetary value of a collection being considered for their own repository. They may provide your organization with a list of appraisers who can (for a fee) make monetary appraisals of the materials for the organization. The donor organization arranges and pays for 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 are encouraged to provide funds to help defray the costs of arrangement, cataloging, and conservation of their donations.

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