

The Process of Donating Your Individual or Organizational Records to an Archival Repository

The records created during the careers of pioneering or otherwise important contributors to the IT field may have lasting archival value in documenting the development of the field. In order for these records to be preserved and made available to many different kinds of users, it is important that they be deposited with an organization that knows how to preserve records, organize them, and make them available. The typical repositories for these collections are university archives and special collection units, specialty libraries, and some museums. It is costly organizations to accept such records, get them into shape so that others may use them, and provide online or in-person access and reference support to the materials. Most repositories have limited budgets and limited capacity to store and process collections, so they must be careful about the collections of records they accept. There are small variations from repository to repository in the procedures they follow and the legal terms of agreement they require. But the practices across these repositories are generally more similar than dissimilar. Below you will find the description prepared by IT History Society member R. Arvid Nelsen of the Charles Babbage Institute that indicates what a potential donor of records could expect as part of the standard donation process, together with brief explanations of why these steps are taken.

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DONATING YOUR RECORDS TO AN ARCHIVAL INSTITUTION

Information for donors

The legal transfer of a collection of records to an archival repository is carried out by means of a gift agreement. The function of the gift agreement is to clarify property and copyrights, disposition rights, care, and access to the collection.

Property and copyrights

In most cases, property and copyrights are transferred to the designated institution, however the agreement does not affect the copyrights to previously published works. Transferring copyright enables the institution to make copies available to researchers and to grant researchers permission to quote from the collection.

Disposition rights

Granting disposition rights to the institution allows archivists to remove from the collection any non-archival material (material that the archivists believe should not be permanently retained). The archivists dispose of such material in accordance with the donor's wishes: it can be returned to the donor, offered to another repository, or destroyed.

Care of the collection

The repository stewards the collection by:

- housing the materials in a secure, climate controlled storage facility
- re-foldering and re-boxing all materials into acid-free containers
- arranging the materials when needed into a logical order
- preparing a finding guide to the collection
- disseminating the finding guide in print form and online
- entering a catalog record for the collection into appropriate online library catalogs and international bibliographic databases
- publicizing the acquisition and the collection's availability for research

Administering access

The gift agreement also allows the archivists to administer access to the collection. While the institution to which the collection is donated might have archives open to the public, access is carefully controlled. When researchers contact the repository, they are typically interviewed by a member of the staff and required to sign a formal agreement establishing the conditions of use of the manuscript collections. Researchers must also state why they wish to use the material and what the final product of their research will be. Collections are housed in closed stacks; on-site researchers use collection guides to identify the specific material they need, and the appropriate boxes are brought to them in a reading room where can be monitored.

Tax deductions

When transferring records to a repository, donors often inquire about the issue of appraising historical records and tax deductions. IRS regulations prohibit the receiving repository from setting a value for a collection. Appraising modern collections can be very costly, and the donor (with his or her lawyer or accountant) must determine if it is worthwhile. It is useful to remember that the appraiser will be evaluating the fair market value of the materials, and high research value may not translate into a high market price. If a donor has the records appraised, the tax deduction must be taken in the same year that the records are physically transferred. If the records are not appraised, a tax deduction cannot be taken on this donation. The donor can, however, deduct as a charitable contribution the cost of physically transferring the records to the institution. Monetary contributions are always welcome and can be used to support the purchase of archival supplies needed to house the collection, project staff to process the collection, special initiatives such as digitization projects, or an annual gift to offset the cost of long term care of the collection.

ITHS thanks the Charles Babbage Institutes for permission to post this document on the ITHS website. For more information about the major archival holdings of the Babbage Institute, contact them at:

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