

**Society of American Archivists
Council Meeting
August 1, 2019
Austin, Texas**

**Tragedy Response Initiative Task Force:
Approve Document Resource Toolkit
(Prepared by Lisa Calahan, Chair)**

BACKGROUND

The Tragedy Response Initiative (TRI) Task Force has completed the first part of our charge to create/compile material for ready accessibility by archivists who are facing a sudden tragedy. TRI members have drafted documentation for a toolkit that, once published, can be readily accessible for archivists and allied professionals responding to tragedy. Task Force members request Council's review and approval for publication on the SAA website.

In 2018, the Tragedy Response Initiative Task Force was established by the SAA Council. It was charged with 1) creating and/or compiling material for ready accessibility by archivists who are facing a sudden tragedy and 2) exploring the feasibility of creating a standing body within SAA that would update documentation as needed and serve as a volunteer tragedy response team. The request is in response both to this charge and to the findings of the Task Force thus far.

Sadly, what makes the Think Tank so relevant is the recurring nature of both human-made tragedies and natural disasters. This recurrence combined with the great speed of technology lead archivists to a new role in society as stewards of contemporary information. Publishing and sharing the documents collated in the toolkit will help archivists and others responsible for archiving the aftermath by providing templates ready for use without further burdening responders.

All of the toolkit documents and templates have been appended below. The prototype for the toolkit, with links to all documentation, can be viewed here:

<https://docs.google.com/document/d/1Cb4KkP6fx52GgINoubMATCxM39VaU5-UK20NidBzn3Q/edit?usp=sharing>.

DISCUSSION

This is a direct response to the Task Force's charge from the Council. The Task Force is requesting permission to publish the Toolkit using the SAA website by hosting on the TRI microsite and as part of SAA's support for archival Resources and Toolkits. We also envision that the documentation will be collaboratively shared with allied organizations.

RECOMMENDATION

THAT the SAA Council approve and support the publication by hosting the content of the Tragedy Response Initiative Task Force Toolkit.

Support Statement: Publishing the Tragedy Response Initiative Toolkit will benefit SAA membership and allied colleagues who have professional obligations to document and preserve collections related to tragic events in their communities and workplaces by providing guidance regarding policies, procedures, and best practices for acquisition, deaccessioning, preservation, and access of memorial collections created as a result of a tragic event(s).

Impact on Strategic Priorities: The publication of the Toolkit as proposed is aligned with three of the four goals in SAA's Strategic Task Force. In terms of Goal One, advocating for archives and archivists, the Toolkit will be one step in ensuring that archivists' professional expertise speaks for itself among a group of diverse stakeholders. By taking a leadership role in bringing together best practices and templates in collaboration with allied colleagues, we will be able also to expand archival thinking itself, thus meeting Goal Three, advancing the field. We will also be able to add to the knowledge base of other archivists and allied professionals to assist in the Strategic Plan's Goal Four, meeting members' needs. Perhaps most importantly the Toolkit will allow an extension of SAA in addressing the immediate needs of both its members and the larger society in which we all live. Little work has been done that recognizes the immediacy and the quantity of documentation happening within minutes of tragedies. Similarly, little work has been done on the place of cultural institutions in helping a society heal, in promoting recognition of diverse viewpoints, and in understanding the resources needed to comprehensively collect the various types of documentation created in the aftermath of tragedies.

Fiscal Impact: Long term management and updating of the Toolkit is desirable as needs and response strategies change with time. Long term management and ensuring that the files are compatible and continue to be accessible with new web platforms and future access issues.



Tragedy Response Initiative Introduction to Templates and Documents

The recurrence of both human-made tragedies and disasters of weather combined with the great speed of technological development lead archivists to a new role in society, as stewards of contemporary information. In order to assist cultural heritage responders, The Society of American Archivists Council created the two year Tragedy Response Initiative Task Force in January 2018. One of the Task Force’s responsibilities is to provide templates and documents that will assist archivists collecting materials on tragedies within their communities.

We hope that sharing the documents collated in the toolkit will help archivists and others responsible for archiving the aftermath of tragic events by providing templates ready for use without further burdening cultural heritage responders.

The documents are designed to be a starting point and are meant to be customized for local use in consultation with communities, administrators, and legal counsel as necessary.

The templates and documents are divided into broad categories and are linked below.

Immediate Response

The following templates are designed for aiding in the collection and gathering of material. Although some of the files are volunteer focused, they contain useful information and strategies for acquiring material.

Before you begin collecting, we highly recommend questioning whether or not collection response is appropriate. More information regarding decision making processes regarding collecting and policies can be found in the “Administrative Policies and Agreements” section.

[Contact Tracking](#)

Suggested use is to track correspondence related monetary, labor, and collection material donations.

[Inventory Guidelines](#)

Instructions on suggested data to collect when packing physical material from memorial sites.

[Inventory Template](#)

Spreadsheet template that can be used to collect data about material obtained from memorial sites.

[Tragedy Response Preparedness Checklist](#)

A checklist of actions and questions to undertake when responding to a tragedy.

[Volunteer Agreement Form](#)

Form for unpaid laborers to complete outlining responsibilities.

[Volunteer Checklist](#)

Provides tips and things to bring for individuals to collect material from a memorial site. Can be used to share with volunteers or to prepare staff.

[Volunteer Procedures](#)

Instructions and procedures for packing material collected from memorial sites.

Collection Management

After material is collected, it will require ongoing management for preservation and access purposes. These forms are designed to help with hiring and budgeting for the collection.

[Job Description](#)

Basic example of an archival job description. Can be modified for internships, temporary staff, etc.

[Management Budget](#)

This is a multi-year budget plan that can be used as a template for granting agencies, local government funding, or internal management planning for costs related to storage, staff, supplies, consultant fees, etc.

[Processing Budget](#)

This budget template is related to costs to arrange and describe a collection for preservation and access. This template only reflects costs for processing physical material and not digital material.

Administrative Policies and Agreements

These guidelines and policies address additions and changes that may need to be made for the acquisition of tragedy based material. They are intended as guidelines for individuals/organizations starting from scratch or making addendums/editions to existing policies. It can be crucial to document decision making processes to help lessen current and future confusion around decisions made.

[Anonymous Donations Accession Policy](#)

Designed to account for the material mailed, left on the doorstep, or at memorial sites.

[Appraisal Policy](#)

Policy to help identify and define community/organizational goals that may help decision making process on the acquisition of materials.

[Collection Policy Guidelines](#)

Guidelines to help focus and explain the reasoning behind collecting material. It is very helpful to have a written policy to aid in conversations with press, communities, administration, etc.

[Collection Policy Template](#)

Drafted template based on the Collection Policy Guidelines. This template is meant to be edited and used as your situation dictates.

[Deaccessioning Policy](#)

There is a possibility that some material acquired may not have long term value, be out of scope of the collection policy, or have preservation issues that could be detrimental to other material. This policy helps identify rationale for removing material from a collection and how to do so respectfully.

[Deed of Gift Template](#)

The deed of gift is a formal and legal agreement between a known donor and the collecting repository, It is used to transfer ownership of and legal rights of the donated materials to the repository.

[Digital Deed of Gift Addendum](#)

Can be used with existing Deed of Gifts to account for digital material.

[Memorandum of Understanding](#)

When multiple repositories and community organizations are responding to the same tragic event, it can be helpful to outline roles, responsibilities, and collecting strategies to prevent confusion and enhance collaborative efforts.

[Organic Material Policy](#)

Organic material may not be appropriate for archival retention. Having a clear policy about what is accepted, what isn't and why, can be helpful to have on hand when asked.

[Use Agreement for Digital Content](#)

Alerts users/researchers to how they may use and reproduce materials in your collections.

Digital Content

[Digital Submissions Terms and Conditions](#)

Template text to use when allowing digital content submissions.

[Digitization Guidelines Bibliography](#)

Bibliography of resources is provided for consultation when undertaking a digitization project.

[Guidelines for Twitter Captures](#)

Offers short descriptions and links to existing (as of Fall 2018) best practices and guidelines.

[Web Content Crawling/Archiving Permission Form](#)

The following form is for use by site owners identified by a repository granting said repository permission to archive web content on the site.

[Web Content Crawling/Archiving Permissions Templates](#)

Three templates that provide notification to website owner/creator to inform of intent to crawl and provide public access when legally possible.

[Website Archiving Nomination Form](#)

Allows community members to nominate websites for content crawling.

Emotional Support

Resources and ethical considerations when working trauma based collections.

[Grief, Trauma, and Self Care Resources](#)

Guidelines of responsibilities of managers and supervisors, tips for administration support, and provides links to national resources that may be of assistance or helpful.

[New Zealand Psychological Society, Emergencies and Traumatic Events Resources](#)

Resources on the impact of trauma and building resiliency for individuals, parents, teachers, supervisors and colleagues.

Oral Histories

Your community may want to preserve the cultural impact of the event through oral histories. The following documents ensure that the oral histories can be preserved and shared.

[Creative Commons Permission Form](#)

Permission form states the interviewee(s) and interviewer intent to allow the repository to share the contents of the interview with the public.

[Release Form](#)

Form that indicates that the interviewee understands the purpose of the interview and grants certain permissions for use and sharing of the interview.

[Basic Interview Tips](#) (links to OHA resources)

Links to the Oral History Association's list of resources on how to conduct oral history interviews.

[Copyright and Licensing Agreement](#)

Indications options for copyright and licensing agreement between the interviewee and the holding repository.

Manuals and Resources

Many other individuals and organizations have created toolkits, guidelines, and documentation related to responding to tragic events. Although not all of these resources are specific to archives, they may be of help.

[“Psychosocial Guidelines for Temporary Memorial Management”](#)

Australian Red Cross pamphlet on managing memorial sites.

[“Bibliography of Disaster/Tragedy Literature as Related to Archives”](#)

Bibliography created by the Tragedy Response Initiative Task Force.

[“Resources for Archiving the Aftermath”](#)

Compiled and created resources on tragedy response in libraries and archives by Ashley Maynor.

Inventory Guidelines

These Inventory Guidelines are for the specific purpose of making a quick inventory of the items recovered from [location] after the [event]. Consistency is of the utmost importance. The instructions below will be of assistance when completing an inventory. The recorder should read the forms and instruction sheet carefully prior to beginning.

An inventory should include the following fields, including the date packed and the box number. Each box should have its own inventory. An inventory can be in any preferred format - handwritten, word document, spreadsheet, etc.

A. BOX #:

Numbering and identification system should be established before gathering material, if possible. Avoid repeating numbers if at all possible, or if you do, include location short names to differentiate between boxes. Ex. Park 01, Park 02 and School 01, School 02, etc.

B. DATE:

Record the date the item was collected from the [location], YYYY-MM-DD. If the date is unknown, record "undated."

C. LOCATION:

Enter the location name of where the item was recovered.

D. DESCRIPTION:

Write a brief description of the physical characteristics of the item(s). The description should contain an object title, material (if known), color, and shape. For example: "Animal, Stuffed: bear, plush, brown, with baseball hat"; or, "Candle: wax, yellow, round glass container".

E. ASSOCIATION:

Record the association from the list below as the item relates to a specific person, a group of individuals or to the incident in general.

Ex., First Name Last Name
Ex., Building Name
Ex., Public park
Ex., NW corner of North Street and West Street

Inventory Guidelines

F. CONDITION:

Use the following letters to denote the current condition of the object. See also the descriptions below.

E	Excellent	In perfect condition with no damage (brand new, or recently created)
G	Good	No physical damage, but used, clearly handled item, or faded.
S	Slight	Having some slight degree of physical damage, but not sufficient to keep it from being preserved. No evidence of dampness or mold.
M	Moderate	Obvious physical damage - torn corner or cracked glass. Damp or burned.
X	Extreme	Broken, torn, wet items.

G. NOTES:

This is an "open" field. It may be used for remarks or comments that might be an additional identifier specific to that object. It can also be used to cross-reference materials. You can, for example, note enclosures or in the instance of photographic items, indicate whether they are mounted/unmounted, cased or uncased. How detailed you want to be will depend on your circumstances--just try to be consistent.

H. INITIALS:

Enter the initials of the person who recorded the information for the corresponding object.

Tragedy Response Checklist

The following is a brief checklist of actions and questions to undertake in the event your organization and/or community experiences and is called upon to respond to a tragedy. Remember, each event and community is different, as are the needs and capacity of each organization. Every item on this checklist might not be relevant to your organization or situation, or you may need to add actions and questions to this list.¹

Before a Tragedy Occurs:

While no community or organization wants to experience a tragedy, the most important action you can take is to prepare in case the worst does happen and you and your organization are called upon to respond. It is strongly suggested that you pursue organizational/administrative support during the planning process. The following are some considerations and preparations you can undertake in advance to ensure you are well positioned to respond quickly, effectively, and sensitively.

- Consider how your community and/or organization might respond to a tragedy. These considerations and discussions should address practical, logistical, and ethical aspects concerns, including but not limited to:
 - Is developing a collection a feasible, appropriate, and sustainable response for your institution and community? Consider the mission of your organization, the desired impact and use of a potential collection, as well as how a collection might be used and by whom.
 - Does your organization possess the physical and/or digital space, personnel, financial, and other resources necessary to acquire, preserve, and provide access to a collection dedicated to a specific tragedy? If not, but collection development is desired, are there peer institutions or other partners and resources within your community who could assist with these efforts?
 - If a collection is created, will it be temporary or permanent? Consider the enduring historical value for future generations of a potential collection and the types of materials that might be selected for inclusion in that collection.
 - If developing a collection is not possible or preferred, are there are other ways in which you and/or your organization might offer support in the aftermath of a tragedy? What types of programming or resources can you offer? Consider both the immediate aftermath as well as the long-term role of your organization in the community's process of grief and remembrance.²

- If you make the decision to respond to a tragedy by creating a dedicated collection, the following are selected suggestions about how you might prepare your organization and community to pursue that response strategy.

¹ Response Checklist partially adapted from "Essential Questions for Managers of Condolence Archives" created by Ashley Maynor, Accessed 2019-07-09.

<https://www.dropbox.com/s/w2ps4u45uublvat/SAA-Maynor-Handout-1.pdf?dl=0>

² Maynor, Ashley. "Five ways we can do better to respond to crises in our communities," Accessed 2019-07-09. <https://ncph.org/history-at-work/five-ways-we-can-do-better-crises-in-our-communities/>

Tragedy Response Checklist

- o Consider preparing drafts of/reviewing any documentation you might need. Creation of unique documentation for tragedy-based collections may not be necessary or relevant to your institution or event. Possible documentation might include, but is not limited to the following:
 - Collecting Policy
 - Deed of Gift and addenda
 - Memorandum of Understanding (between your organization and other organizations that might be involved in response efforts)
 - Volunteer Agreement and Guidelines
 - Guidelines for Social Media Capture
 - Web Archiving Agreement
 - Digital Submission Terms
- o Identify partners within your organization and community to support immediate response efforts. This could be ad hoc or through the formalization of an internal emergency response team. These might include, but are not limited to the following:
 - Peer institutions
 - Storage solutions (both temporary and long-term)
 - Public and internal communication networks and personnel
 - IT personnel and resources (e.g. server space, web archiving services, social media capture, etc.)
 - Established volunteer and emergency response networks (e.g. Red Cross, Rotary, service organizations, campus security, local law enforcement and emergency response, etc.)
- o Identify peer institutions who have dealt with responding to and archiving tragedies in their own communities/organizations.
- o Identify resources through your professional organizations and networks that may be able to provide information on best practices or resources for immediate response (e.g. disaster recovery networks, regional consortia teams, etc.)
- o Identify appropriate psychological and emotional support providers for your staff and any volunteers that may assist with immediate response and long-term management of tragedy-related collections (e.g. campus and local counseling services and groups, HR support services, etc.)

Immediately following a tragedy:

- Identify stakeholders in the community and your organization (e.g. victim and family groups, peer institutions, emergency responders, etc.).
- In consultation with stakeholders, update any existing draft documentation as necessary to ensure it is relevant to the tragedy that has occurred. If no existing draft documentation has been created, determine what types of documentation might be needed.
- Contact the partners you identified during your preparation period to activate any arrangements or agreements that may have been established (e.g. temporary storage, communication plan, digital harvesting, volunteer networks, trauma support, emergency responders, etc.).

[This template was created by the Society of American Archivists's Tragedy Response Initiative Task Force to assist with the management of material acquired in response to a tragic event. Please edit or alter as your situation dictates. DATE CREATED: 20190508. DATE EDITED: 20190709.]

Tragedy Response Checklist

- If the decision has been made to collect materials, identify the location(s) of any spontaneous or temporary memorial(s). In consultation with stakeholders, assess the ability to designate locations for materials to be deposited if no public memorial sites have developed organically.
- Identify where materials will be moved to, any necessary quarantine or initial remediation services, and who will be responsible for these actions.
- In consultation with stakeholders, establish a plan for the periodic removal of temporary memorial materials as relevant. Any removals should commence after an appropriate interval of public engagement that takes into account the location of the memorial site and factors such as inclement weather forecasts.
- Determine who will be responsible for removing materials, if relevant. Consider partnering with a neutral and recognized community organization such as the Red Cross if a volunteer network of archival volunteers cannot be assembled. Communicate your plan for removal, storage (both short-term and long-term), and any additional needs through notices at memorial site(s), through social and traditional media, and any other relevant and/or established outlets.
- Connect staff and volunteers to psychological and emotional support providers.

After the Immediate Response Period:

- In consultation with stakeholders, determine appraisal guidelines for determining which materials will be retained and for how long.
- Determine who “owns” the materials and who will be responsible for organizing and maintaining any materials that may have been collected. If your organization will be the final repository for the materials/collection:
 - Identify long-term storage for those materials that will be permanently retained, whether digitally (e.g. server space) or physically.
 - Identify any additional staffing and budgetary needs for arranging, describing, and managing digital and physical collections.
- Maintain contact with psychological and emotional support providers for staff and volunteers.

Long-term Preservation, Access, Development, and Management:

- In consultation with stakeholders, determine access procedures and restrictions.
- Determine whether controversial or objectionable materials will be retained. Consider the ways in which the collection might be used by future generations.
- Determine the timeline and feasibility for committing to a permanent archive or memorial. Consider the resources of your organization as well as the wishes of stakeholders.
- Consider whether and how the collection will grow and be used (e.g. oral histories, anniversary material drives, additional collecting areas, changing stakeholders, etc.).
- Plan future and ongoing opportunities to engage with community stakeholders and participate in the ongoing legacy and memorialization of the tragedy.
- Continue to communicate actions and plans surrounding the collection.

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Volunteer Checklist

Thank you all for volunteering your time to help. We understand this is an emotional experience for us all, and we appreciate your willingness to approach the sensitive task of assisting with the preservation of these memorial items by moving them to [institution]. Because of the emotions and grief involved, both within our volunteer corps and the general public who will be on site, we do ask that you read the following and adhere to the guidelines.¹

RAIN/INCLEMENT WEATHER:

If there is inclement or hazardous weather, the [volunteer event] will be postponed. The project will continue as planned if the weather is drizzly, windy, hot, cold, or overcast.

CLOTHING:

Please expect to get very dirty and dress with that in mind. Below is a list of recommendations:

- Please wear a hat and/or appropriate sunscreen
- Please wear closed-toe shoes
- Gloves are highly recommended. Plastic or rubberized gloves that will repel water are preferred
- Kneeling pads are recommended
- Light masks are recommended, especially for those suffering with allergies
- Please be conscious of the clothing items you choose to wear. Avoid all logos or images that may have a hidden, negative, or political message, or may be misinterpreted by visitors

RECOMMENDED ITEMS TO BRING:

- Kleenex
- Utility knives / retractable razors for cutting tape and string
- Bottled water

PLEASE DO NOT BRING:

- Listening devices without headphones
- Pets
- Small children

PHYSICAL REQUIREMENTS / DUTIES:

This will be a very labor intensive task. Please be prepared to bend, stoop, kneel, and lift. You will be working with organic and wet materials, so be aware of the presence of pollens, molds, and dust.

¹ If you are experiencing emotional distress or health challenges due to exposure to tragedy or disaster-related objects and materials, please seek support from either your community, family, friends or a healthcare provider.

Volunteer Checklist

OTHER INFORMATION:

- A break/refreshment area will be provided, please wash hands before handling material.
- Please do not eat while packing material.
- Lunch will be provided for morning volunteers. [Institution] is unfortunately unable to accommodate dietary restrictions during [volunteer events]. If you require special dietary accommodations, please be prepared to supply your own meal. Thank you for your understanding.

Thank you again for being a part of this very important project!

Volunteer Procedures

1. Safety
 - a. DO NOT OPEN OR MOVE ANY SUSPICIOUS PACKAGES-CALL SECURITY -
 - b. Pack heavy items on bottom of box
 - c. Keep wet items away from dry to minimize contamination
2. General Recovery Instructions for ALL objects
 - a. Keep grouped items together if possible
 - b. Keep like materials together if possible (paper w/ paper, glass w/ glass ...)
 - c. Per the Organic Materials Policy, all perishable materials like flowers and food will NOT be recovered, photograph and keep accompanying notes/cards.
 - d. If possible, air-dry damp or wet items as instructed
3. Photography
 - a. If possible, take a few overall pictures of the area where you are working before beginning to collect material
4. Supplies
 - a. Plastic sheeting—used to protect mementos from wet ground
 - b. Paper towels - used to quickly wipe or blot wet objects, also used for packing
 - c. Knife or box cutter—used to cut tape, plastic sheeting or other conservation supplies
 - d. Tape - used to seal boxes
 - e. String—used to secure oversize items that can be rolled
 - f. Waterproof markers - used to label boxes
 - g. Large plastic bags—used to line boxes holding wet materials
 - h. Small plastic bags—used to store dry or non-perishable items (candles, ceramics...)
 - i. Paper/pencil for note taking
 - j. Moving boxes or archival record cartons
 - k. [repository name] business cards and/or flyers regarding the project
5. Packing Instructions For ALL objects
 - a. Work in small teams (2-3 people).
 - b. Protect yourself with gloves and particle masks, if necessary.
 - c. Remove items from the outside of piles, top first.
 - d. Items will be grouped together for individual victims.
 - e. Sealed messages that are addressed to a specific person or group will go into separate boxes for future delivery.
6. Packing Instructions for WET/DAMP objects
 - a. Quickly wipe or blot sturdy objects as time allows. Do not spend time rubbing or vigorously cleaning—this may be done later once objects have been unpacked.

Volunteer Procedures

- b. Lay out cloth and/or paper items on plastic sheets in designated drying areas to air-dry (15-20 min.) before packing. Do not lay out paper items if there is a chance they will blow away.
 - c. Wet items that may benefit from extra drying time may be left on plastic for part of the day, provided space is available.
 - d. Wet or damp items that are especially unique should be transported to recovery personnel for more professional packing and treatment.
 - e. Cloth or paper that will not dry quickly should be wrapped in extra paper towels.
 - f. Mark bags or boxes "W" for Wet so they will receive a higher priority for unpacking
 - g. Mark bags or boxes "I" for irretrievable if the item has been excessively saturated (colors bleeding, writing illegible, obvious mold ...)
 - h. If there is a threat of rain or it is very windy, do not lay objects out to dry.
7. Packing Instructions for Oversized Items
- a. Do not overfill boxes. Fill only with enough objects as can be easily carried.
 - b. Loose roll oversized items like banners or posters on tables with cardboard tubes. Secure with string, support with sheeting, and label.
8. Transfer Instructions
- a. [include specific instructions for volunteers regarding the pick-up plans for transfer to the archives]

JOB DESCRIPTION

The [staff/internship/volunteer] position of [Job Title] will support the Archivist in the day-to-day efforts involving the [Name of Collection/Event], particularly the processing of collections and creation of finding aids and collection inventories. They will participate in planning and programming, both within the [name of library/archive/repository/community] as well as across [campus/repository/institution/community]. Previous experience working with archival collections is preferred, but not required.

This is an [permanent paid/temporary paid/internship paid/volunteer unpaid] position.

Hours

[eligible hours or required schedule] Work will occur within hours the [Name of repository] is open.

Qualifications

- Graduate or student currently enrolled in Library Science, Museum Studies or History graduate program highly preferred, but not required.
- Sensitivity to the special nature of a tragedy-based archives
- Strong written and spoken communication skills
- Ability to pay close attention to detail and follow instructions
- Ability to follow directions and achieve goals under strict time constraints
- Comfortability working independently
- Advanced computer experience/knowledge
- Experience using Microsoft and Google applications

Responsibilities

- Report to and work closely with the [supervisor/archivist/curator] to follow and adhere to archival processing best practices
- With the assistance of the supervisor, develop a work plan for project completion
- Rehouse, arrange, and describe the collection
- Identify and make recommendations regarding deaccessioning and/or restrictions
- Identify and make recommendations regarding preservation for fragile, deteriorating, or damaged material
- Identify and make recommendations regarding identification of, specialized rehousing for, and arrangement of oversize material
- Research and draft historical and scope notes

To apply, please email [cover letter, resume, references] by [mm/dd/yyyy] to [your name, email address or other contact information]

Management Budget [TEMPLATE]

[This template was created by the Society of American Archivists's Tragedy Response Initiative Task Force to assist with the management of material acquired in response to a tragic event. Please edit or alter as your situation dictates. DATE CREATED: 20190508. DATE EDITED:]

	[name here]
Collection Title:	[if applicable]
Project Period:	[if applicable]

BUDGET SUMMARY

NOTE: The Budget Summary section is populated from information provided in the Budget Detail sections that follow. Please do not attempt to enter figures into the Budget Summary.

	Requested Funds
Salaries and Wages	\$0
Fringe Benefits	\$0
Consultant and Training Fees	\$0
Supplies and Materials	\$0
Services	\$0
Other Costs	\$0
TOTAL	\$0

BUDGET DETAIL: YEAR ONE

Budget detail for the period

FROM (mm/yyyy):	mm/yyyy
TO (mm/yyyy):	mm/yyyy

1. Salaries and Wages

Provide the names and titles of the principal personnel. For support staff, include the title of each position and indicate the number of persons who will be employed in that capacity. Unpaid volunteers should not be included.

Name/Title of Position	No.		Requested Funds
Ex.: Project Manager and Metadata Specialist (to be hired)	1	Annual salary at 100%	\$55,000
Ex.: Student Workers	7	38 wks @ \$12.00/hour	\$38,304
		SUBTOTAL	\$93,304

2. Fringe Benefits

If more than one rate is used, list each rate and salary base.

Rate		Salary Base	Requested Funds
33.7	% of	\$55,000.00	\$18,535
	% of		
	% of		
	% of		
		SUBTOTAL	\$18,535

3. Consultant and Training Fees

Include payments for professional or technical consultants.

Name or type of consultant or training	No.	Method of Cost Computation	Requested Funds

Management Budget [TEMPLATE]

FROM (mm/yyyy):	04/2017	
TO (mm/yyyy):	03/2018	

1. Salaries and Wages

Provide the names and titles of the principal project personnel. For support staff, include the title of each position and indicate the number of persons who will be employed in that capacity. Unpaid volunteers should not be included.

Name/Title of Position	No.	Method of Cost Computation	Requested Funds
			\$0
			\$0
SUBTOTAL			\$0

2. Fringe Benefits

If more than one rate is used, list each rate and salary base.

Rate		Salary Base	Requested Funds
33.7	% of	\$0.00	\$0
	% of		
	% of		
	% of		
SUBTOTAL			\$0

3. Consultant and Training Fees

Include payments for professional or technical consultants.

Name or type of consultant or training	No.	Method of Cost Computation	Requested Funds
SUBTOTAL			\$0

4. Supplies and materials

Include consumable supplies, materials to be used in the project and items of expendable equipment (i.e., equipment items costing less than \$5,000 and with an estimated useful life of less than a year). The proposed purchase of software which is both essential and will be dedicated to the project may be included here.

Item	Basis/Method of Cost Computation	Requested Funds
SUBTOTAL		\$0

5. Services

Include the cost of other services (e.g. equipment rental, server time, backup charges) related to project objectives that are not included under other budget categories. Subcontracts should be included in this category.

Management Budget [TEMPLATE]

Item	Basis/Method of Cost Computation	Requested Funds
SUBTOTAL		\$0

6. Other costs

Include any items not previously listed. Please note that "miscellaneous" and "contingency" are not acceptable budget categories.

Funds to cover indirect costs may not be requested.

Item	Basis/Method of Cost Computation	Requested Funds
SUBTOTAL		\$0

7. Total costs **Requested Funds**

(Subtotals of items 1 through 6) \$0

BUDGET DETAIL: YEAR THREE

Budget detail for the period

FROM (mm/yyyy): _____

TO (mm/yyyy): _____

1. Salaries and Wages

Provide the names and titles of the principal project personnel. For support staff, include the title of each position and indicate the number of persons who will be employed in that capacity. Unpaid volunteers should not be included.

Name/Title of Position	No.	Method of Cost Computation	Requested Funds
SUBTOTAL			\$0

2. Fringe Benefits

If more than one rate is used, list each rate and salary base.

Rate		Salary Base	Requested Funds
	% of		
	% of		
	% of		
	% of		

Processing Budget Template

[This template was created by the Society of American Archivists's Tragedy Response Initiative Task Force to assist with the management of material acquired in response to a tragic event. Please edit or alter as your situation dictates. DATE CREATED: 20190508. DATE EDITED.]

Cubic/Linear feet (or #of boxes)	0		
Estimated Hour per Foot*:	16		
Total Processing Hours:	0		
Processor/Consultant Hourly Wage	\$0.00		
Total Staff Cost:	\$0.00		
Supplies**:			
Record Cartons	0		
Letter folders	0		
Legal folders	0		
OS boxes	0		
Total Supply Cost:	\$0.00		
Processing Cost (fringe/overhead/e	\$0.00		
Collection Processing Cost:	\$0.00		
*Hour per foot includes rehousing, arrangement, description.			
**Supply estimates based on the current collection size (including known oversize material).			

MATERIALS RECEIPT FORM, ANONYMOUS DONATIONS

[department/institution name]

Materials Description: (Include basic description of materials. Attach additional pages as needed.)

Materials gathered at: _____

Reason for collecting materials: _____

Notes:

Name of staff member collecting materials (print)

Date

MATERIALS RECEIPT FORM, ANONYMOUS DONATIONS

[department/institution name]

Use the **Materials Receipt Form** when gathering/acquiring materials where donor information is unknown or when gathering items from a memorial/remembrance site.

How to fill out the Materials Receipt Form:

1. **Materials Description:** Provide enough information to identify the materials being received (quantity, types of containers, etc.). If possible, record background information on the collection (subject, approximate dates, etc.).
2. **Materials gathered at:** Information about where the materials were gathered. Be as specific as possible.
3. **Reason for collecting materials:** Reason(s) why materials are being collected i.e. materials left at the site of an event, items that document/memorialize the event, unique materials/items that document an event.
4. **Notes:** Include any notes about what was collected, the collection site, conditions under which materials were collected, etc. that do not meet the criteria of other sections of this form.
5. **Name of staff member collecting materials:** Who collected the materials or was overseeing the collecting of materials.

Keep the following in mind when gathering materials:

1. Only collect materials that your institution/archive intends to add to your permanent collection.
2. Think about the long-term preservation of the materials you collect. Are you prepared to handle organic materials, such as flowers? Were materials exposed to the elements and how will this impact their preservation?
3. Be prepared to explain why you are gathering the materials.
4. Be prepared to provide information about your institution and why you/your institution is involved with gathering the materials.
5. Be prepared to explain how you/your institution will handle/store/provide access to the materials.
6. When possible, bring business cards to give out while collecting materials.
7. Wear a nametag, ID badge, article of clothing with official institution logo, or other way to identify yourself as working on behalf of the institution.
8. If the location is very public, avoid gathering materials in peak times.
9. If possible, determine who owns the physical location where you are gathering materials and work with them as you collect items.
10. If possible, photograph item in place before its removal. This has been recommended by many people involved in previous disasters, and will also allow you to document adjacent materials to add context to new additions to your collection.

Appraisal Policy Guidelines

Appraisal is defined as: 1. The process of identifying materials offered to an archives that have sufficient value to be accessioned. - 2. The process of determining the length of time records should be retained, based on legal requirements and on their current and potential usefulness.¹

Context

Think about the context in which the physical or digital materials were created. When and where the material is collected will impact the context. It is also helpful for staff to understand the content in order to explain to donors and community members why/why not material may/may not be collected. **Consider the following:**

- Who created the record(s) and why
- What was the intended use of the records, and by whom
- How is the record illustrative of the event or social narrative after the event

Content

Consider how the material will be useful for community members and future users for research purposes. How will the material provide insight to historical events, related social developments, document the development of social and/or political change, and community healing. This will need to be balanced with the quantity of material. **Consider the following:**

- Does the material provide evidence of community response(s) and/or activities
- Does the material contain information about people, events, or topics related to the event
- Does the material provide insight or perspectives not traditionally documented by the archives
- Does every item need to be saved, or would a representative sample be more sustainable

Uniqueness

Determine if the materials are likely to be the only or most complete source reflecting the event or community response. Uniqueness is determined by probability that the information is unlikely to be recorded elsewhere. Unique materials may include, but are not limited to:

- Material about people, events, and activities
- Material concerning the impact of significant activities, communities, programs or related events, evidence of local culture and support
- Material evidence of information, insights or perspectives not otherwise documented
- Material that is no duplicated elsewhere or in another collection/archival project

¹ A Glossary of Archival and Records Terminology. Society of American Archivists. <https://www2.archivists.org/glossary/terms/a/appraisal>. Accessed 20190104.

Appraisal Policy Guidelines

Condition

Does the organization of material, potential pest or water damage, obsolete formats, hazardous material, or file format, affect the ability to preserve or provide access to the material. **Consider the following:**

- Does the physical condition of the material put other acquisitions at risk of mold or pest exposure
- Does the material contain hazardous or dangerous components that could cause health risks
- Has the material deteriorated to the point where it is inaccessible to users
- Does the material lack context to the point that the uniqueness is questioned
- Can the same information be made accessible from other formats or materials in better condition or with more contextual evidence

Stewardship

Consider your individual repository's ability to be good stewards by understanding the resources necessary to preserve and provide access to the material. Not having immediate financial or staff resources should not preclude the acceptance of material of historic value, but should garner conversations on stewardship. **Consider the following:**

- Does the material, in comparison with internal collecting policies and goals, warrant the resources required to maintain it
- Can the repository justify potential conservation measures
- Does the repository have adequate physical and/or server space to store physical and digital material

Documentation

It is recommended that staff document appraisal decisions for future reference. One could use the prompts and sections in this policy as a template to provide one or two sentences on appraisal decisions made for the specific collection or material.

Anonymous donations

If material is donated anonymously, or original donor(s) cannot be identified, please review your state's abandoned property laws regarding retention and ownership before beginning the appraisal process. The SAA Abandoned Property Project links to known abandoned property laws and legislation.

<https://www2.archivists.org/groups/acquisitions-appraisal-section/abandoned-property-project>

GUIDELINES FOR TEMPLATE COLLECTION POLICY FOR TRAGEDY-BASED ARCHIVES

MISSION STATEMENT/PURPOSE

Use this section to explicitly state the reason the archive or collection exists. Include the event or events being documented, whether you are interested in material about the aftermath of the event(s), the donor communities from whom you are collecting, etc. If applicable, include specific dates/date ranges or locations included in the scope of your collecting policy. The more specific your information is here, the stronger your collection policy will be.

POLICY

Use this section to briefly state the guidelines governing acquisition, arrangement, retention, and access for the archive or collection. Include information about who has the authority to select materials for the archive/collection, the ownership of the material once it is transferred to or otherwise acquired by your institution, and the process by which items may be disposed of, sampled, or deaccessioned. Consider adding a statement about controversial materials if you will be including them in your collecting scope.

How will you provide access to the material (finding aids, by request only, etc.)? Who is eligible to donate? With whom should potential donors communicate?

This information need not be as exhaustive as policy and procedure which may be found in a comprehensive Collections Management Policy.

If you will be collecting material from spontaneous or public memorial sites, indicate the types of materials that will be retained, discarded, or sampled and the criteria for each.

SCOPE

Use this section to specify materials you will collect. State what formats you are willing and able to accept (papers, audiovisual, born-digital, etc.). Examples of common materials to collect for a tragedy-based archives include but are not limited to:

- Artistic responses
- Audio recordings
- Condolence letters/sympathy cards
- Correspondence (digital and analog)
- Film footage (news coverage, documentaries, home movies, witness recordings, etc.)
- Government reports
- Items physically transformed by the event (e.g. architectural debris, personal belongings, etc.)
- Legislation
- Memorabilia
- Memorial programs and artifacts
- News clippings (digital and analog)

GUIDELINES FOR TEMPLATE COLLECTION POLICY FOR TRAGEDY-BASED ARCHIVES

- Oral or video histories and written accounts
- Organizational records, reports, newsletters, etc. of associated survivors/victims/advocacy groups
- Personal effects
- Photographs
- Publications
- Reports and legislation
- Scrapbooks
- Social media
- Trial information, court rulings, judicial opinions
- Tributes left at spontaneous, temporary, or public memorials

SIGNED

Use this section to sign and date your Collection Policy to track authorization and revisions.

TEMPLATE COLLECTION POLICY FOR TRAGEDY-BASED ARCHIVES

MISSION/STATEMENT OF PURPOSE

The [archives | collection] exists to document and preserve materials related to [event | and aftermath]. This may include materials from [victims' families and friends | survivors | investigators | first responders and relief agencies | etc.].

POLICY

Materials donated to the [archives | collection] must have unique and enduring historical value. Records of enduring value are those that document [event]; the operations, activities and procedures of organizations and individuals associated with [event]; and the [lives of victims | experiences of survivors and witnesses].

Selection of appropriate material for acquisition by the [archives | collection] lies with the [curator | archivist | director | board], and, under their direction, in qualified staff members. The [archives | collection] may elect to sample specific categories of collection material and add new collecting areas pertinent to its evolving mission and developments related to [event].

Donors must have the legal right to donate materials under consideration for acquisition. Where appropriate and possible, gifted items will be acknowledged with a Deed of Gift. The [archives | collection] is responsible for managing gifted items in compliance with institutional policies, as well as relevant state and federal law as applicable. Anonymous donations or donations from unidentified sources are subject to the parameters of the [archives' | collection's] Anonymous Donations policies.

Certain materials for which the [archives | collection] believes it cannot take custody due to [housing | preservation | rights | privacy] concerns will not be retained. Similarly, the [archives | collection] does not acquire items which are [perishable | hazardous | contain biological material | have ongoing evidentiary value | are prohibited for transfer of ownership to the archives due local, state, or federal law, etc.]. Materials from [spontaneous | public | temporary] memorial sites not eligible for consideration for retention by the [archives | collection] include [mass produced religious or commercial products without perceived personalization, biological material, etc.].

Retention of material from [spontaneous | public | temporary] memorials at the [time of the event | anniversaries | other times as specified] shall be left to the discretion of the institution and its authorized staff. All material from such sites not retained by the [archives | collection] will be disposed of in accordance with professional best practice and established procedures of the institution. The [archives | collection] also reserves the right to periodically reevaluate materials for deaccession or sampling in accordance with best practice and established procedures and policies of the institution.

The [archives | collection] includes material documenting opposing viewpoints, but does not endorse any specific viewpoint or interpretation of [event] within its holdings. Wantonly

TEMPLATE COLLECTION POLICY FOR TRAGEDY-BASED ARCHIVES

inaccurate or blatantly false materials and information may not be eligible for inclusion in the [archives | collection].

Material held by the [archives | collection] will be made available for research [by appointment only | at the discretion of the institution | onsite | online | by means of electronic finding aids].

COLLECTING SCOPE

Records may be in [any physical format | digital form | paper form, etc.].

[Refer to the list of potential items in the Guidelines for Template Collection Policy for Tragedy-Based Archives]

SIGNED

Name:

Title:

Signature:

Date:

Deaccessioning Recommendations*

Anonymous donations: Please review your state's abandoned property laws regarding retention and ownership before beginning the deaccessioning process. The SAA Abandoned Property Project links to known abandoned property laws and legislation.

<https://www2.archivists.org/groups/acquisitions-appraisal-section/abandoned-property-project>

Review your repository's collecting scope. If the acquisition of the tragedy based collection is not reflected in the repository collection scope, consider including an addendum within the collection's management file.

Reappraisal and Deaccessioning rationale

Clearly document why the collection is being reappraised and/or deaccessioned. Rationale may include:

- Relevance to collection is unclear
- Context cannot be evaluated or determined
- Material has not been requested or used for ____ period of time
- Material's physical condition is such that it jeopardizes other collections in shared storage spaces
- In consultation with the bereaved community, the material was identified as not having enduring historical value.
- Material is biological in nature and violates (previous or new) repository biological hazards policy

Deaccession Options

- Transfer to appropriate repository
- Return to donor/community
- Reuse for memorial or commemoration¹
- Destruction [recommend pursuing Transfer, Return, or Reuse options first and when applicable]

Publicity

Because of the often public and communal efforts of collecting material regarding a tragic event, it is recommended that the involved community/individuals be notified prior to the deaccessioning of a whole collection.

**These recommendations are based on Guidelines for Reappraisal and Deaccessioning, created by the SAA Reappraisal and Deaccessioning Development and Review Team.*

https://www2.archivists.org/sites/all/files/GuidelinesForReappraisalDeaccessioning_2017.pdf

¹ Examples of this are Newtown Memorial, where they incinerated some of the donations and turned them into sacred stones for the memorial.

<https://www.cnn.com/2013/12/27/justice/newtown-mementos-incinerated-memorial/index.html>

Deed of Gift Template

Introduction

The following is a sample deed of gift form with essential elements as described in the Society of American Archivists (SAA) *A Guide to Deeds of Gift*, <https://www2.archivists.org/publications/brochures/deeds-of-gift>. Please review this guide along with consulting legal counsel for appropriate local, state, and federal laws governing gifts to your organization and any organizational governing board prior to implementation of a deed of gift for the organization. The sample form below is partially adapted from deeds of gift from Connecticut State Library, Dartmouth College Library, DePaul University Library, Xavier University, and other examples made available by the SAA Museum Archives Section. For more examples of deeds of gift see the Museum Archives Section *Standards and Best Practices Resource Guide: 2. Appraisal and Acquisition/Accession* resources, <https://www2.archivists.org/groups/museum-archives-section/2-appraisal-and-acquisitionaccession>.

**[FULL LEGAL NAME OF ORGANIZATION]
[ORGANIZATION ADDRESS, TELEPHONE NUMBER, EMAIL ADDRESS]
DEED OF GIFT**

Donor Information:

Full Legal Name: _____
Street Address: _____
City/State/Zip: _____
Telephone Number: _____
Email address: _____

Agreement:

I, **[printed name of donor]**, (hereinafter referred to as the Donor), on behalf of **[Printed Name of Person / Company / Institution, if applicable]**, (hereinafter referred to as the Authorized Representative), hereby irrevocably and unconditionally donate the property (hereinafter referred to as Items/Materials) described below or on other attached page[s] to the **[full legal name of organization]**.

Description of Item(s)/Material(s):

Deed of Gift Template

I affirm that I lawfully own or am an Authorized Representative of the items/materials described above or on other attached page(s), have the right to convey that the items/materials are free and clear of all liens, claims, charges, and encumbrances. Legal title and physical custody of the items/materials shall pass to the **[full legal name of organization]** upon their delivery to the **[insert name of the authorized representative to accept gifts on behalf of the organization]** or designated representative.

The Donor agrees to transfer the following copyright, literary rights, artistic rights, or patents (collectively, “Intellectual Property Rights”) that may be associated with the items/materials being donated. Please check/initial one of the following:

Any and all intellectual property rights held by the Donor are transferred to **[full legal name of organization]**.

Any and all intellectual property rights held by the Donor are transferred to **[full legal name of organization]**, except for:

The Donor shall retain intellectual property rights, but conveys the following rights to **[full legal name of organization]**:

The Donor agrees that these items/materials may be made available for research and public use according to the established policies and procedures of **[full legal name of organization]**.

Sensitive items/materials identified by the Donor at the time of donation, or that are discovered by **[full legal name of organization]** staff during processing, may be restricted to protect my/our privacy or others' privacy for a limited and clearly stated period of time. [Indicate, per your institution's policy, regarding how restrictions will be recorded.]

The Donor grants that items/materials **[may/may not]** be used in physical and digital exhibits, and **[may/may not]** be reproduced, digitized, and reformatted for preservation and access in accordance with established policies and procedures of **[full legal name of organization]**.

Any portion of the property donated to the **[full legal name of organization]** that are not retained may be returned to the Donor, if desired [Yes, No]. If the donor does want the items/material returned, the **[full legal name of organization]** will notify the Donor in writing of the items/materials it does not wish to retain. If the **[full legal name of organization]** does not hear back from the Donor in _____ weeks from the date of notification, the **[full legal name of organization]** may proceed with the disposal of these items by whatever means it sees fit.

The Donor has not received any goods or services from **[full legal name of organization]** in return for this gift.

Deed of Gift Template

The staff of **[full legal name of organization]** is not permitted to furnish appraisals but will make the items available for appraisal upon the written request of the Donor. The **[full legal name of organization]** may accept your appraisal valuation of your gift for insurance purposes.

Additional Terms and Conditions:

Donor Name (Printed)

Donor Signature

Date

Accepted on behalf of **[full legal name of organization]**

Authorized Name and Position Title (Printed)

Authorized Signature

Date

Digital Deed of Gift Addendum

Below is an example of a sample digital rights or memorandum of agreement for digital rights form. This sample was taken from the Connecticut State Library Memorandum of Agreement for Digital Rights. This form can be used in conjunction with your organization's deed of gift form or incorporated into the overall deed of gift. A separate form can allow for an easier implementation. For example, the Connecticut State Library created this form to take digital rights only over items brought and scanned at *Remembering World War One* community digitization events in Connecticut. In most instances the individual donors retained the physical object. However, in some instances individuals donate the physical material as well using our standard deed of gift form.

**[FULL LEGAL NAME OF ORGANIZATION]
[MEMORANDUM OF AGREEMENT FOR DIGITAL RIGHTS / DEED OF GIFT FOR
DIGITAL RIGHTS]**

For items being digitally captured at a [full legal name of organization {hereinafter "Library/Archive/Museum"}] digitization event.

I/we agree to allow the **[name of organization]** to digitally capture the physical objects I/we have brought in.

I/we guarantee that the I/we own the physical objects submitted or that the owner of these rights has authorized me/us to submit the physical objects for digital capture on their behalf. Furthermore I/we guarantee that the physical objects are not copyright protected or that I/we own the rights to the physical objects.

_____ I/we accept the terms & conditions.

*If you choose not to accept these terms, the **[name of organization]** cannot digitize your physical objects or record your stories.*

For digital objects items being donated to the [name of organization].

I/we guarantee that the I/we own the digital objects submitted or that the owner of these rights has authorized me/us to submit the digital objects on their behalf. Furthermore I/we guarantee that the digital objects are not copyright protected or that I/we own the rights to the digital objects.

_____ I/we accept the terms & conditions.

Digital Deed of Gift Addendum

If you choose not to accept these terms, the [name of organization] cannot digitize your physical objects or record your stories.

For ALL digital objects created by or submitted to the [name of organization]:

I/we, understand that the digital objects I/we are submitting will become part of the [name of organization] collections. I/we understand that all digital objects I/we have submitted will be freely available for use in research, teaching, and personal use. I/we understand that people may download and use the digital objects I/we are submitting.

I/we understand that any descriptive data I/we provide may be used by researchers and/or the institution in any way they see fit.

_____ I/we accept the terms & conditions.

If you choose not to accept these terms, the [name of organization] cannot digitize your physical objects or record your stories.

For oral history interviews or other audio and/or video interviews:

_____ I will allow my audio and/or video interview to be made available. I hereby irrevocably transfer to the [name of organization] all right, legal title, interest and ownership in, including copyright, to my oral history interview or other audio and/or video interview.

For media inquiries:

Journalists, writers and filmmakers who see your story or items/materials online may be interested in contacting you further. If the [name of organization] is contacted by someone wanting to contact you, let us know if:

_____ You permit [full name of institution] for us to pass on your contact details directly.

_____ You would like [name of organization] to make contact with you first.

_____ You don't wish to be contacted.

Donor Information:

Full Name: _____

Street Address: _____

Digital Deed of Gift Addendum

City: _____ State: _____ Zip Code: _____

Email: _____

Phone: _____

For Internal Use:

Received by: _____

Date: _____

Memorandum of Understanding

Between the [list repositories and others as necessary]

For [give project name]

This Memorandum of Understanding (hereafter MOU) concerns the [project name], a project spearheaded by [project lead] and in consultation with a project advisory board representing the [community/communities].

Project Objectives:

[list as necessary]

- To gather, curate, and make accessible physical materials from _____ that document _____.
- To gather, curate, and make accessible digital materials from _____ that document _____.
- To conduct oral history interviews, audio and/or video, with _____.
- To curate an exhibit about the project after completion.
- To preserve physical and/or digital materials from _____.
- Etc.

Partner Contributions:

[Repository 1] agrees to the following for [agreed upon amount of time or in perpetuity]:

[list project objective and tasks repository or other contributor will perform; define any collecting scopes; repeat for each repository/contributor; give any deadlines as necessary]

Contacts:

[List all participating contact names, emails, addresses, phone numbers]

Both/All parties acknowledge that this is a working document and amendments may be made as needed throughout the course of the project. Amendments must be reviewed and approved by [project lead] and only as deemed necessary, with the project's advisory board.

Signature constitutes agreement with conditions above.

Name: [project lead]

Date

Name: [etc.]

Date

NOTE: an MOU is not necessarily legally binding, but having an attorney (for one or each participant) review is advised. If an advisory board is not being utilized, omit that language.

Organic Material Policy

General Organic Materials

Perishable items such as food, flowers, and other organic materials are not eligible for permanent retention by the [archives | collection]. Organic and other perishable materials from [spontaneous | public | temporary] memorials may be selected for group or item-level photographic or other documentation at the discretion of the [curator | archivist | director | board]. All such materials not eligible for permanent retention by the [archives | collection] will be disposed of in accordance with best practice and established legal and safety procedures and policies of the [archives | collection].

Human Remains¹

Human remains include tangible parts of once living person(s). They may include bones, preserved soft tissues, teeth, hair, or nails. Human remains can also form part of cultural objects.²

Donors offering items to the [archives | collection] that may include human remains. If the donation is suspected of, or confirmed as, containing human remains related to a criminal investigation the donor will be placed in contact with representatives of the [appropriate local agency]. The [archives | collection] reserves the right to refuse temporary or permanent legal or physical custody of such items, until such time that a reasonable determination has been made that they do not contain human remains. In select instances, material identified as including human remains may be identified for addition to the [archives | collection] at the discretion of the [curator | archivist | director | board].

The [archives | collection] recognizes that some material entrusted to its care may carry debris and evidence of damage resulting from [event]. The [archives | collection] staff routinely offer the [appropriate local agency] the opportunity to review and test all such items for the presence of human remains. Should such review and testing result in the discovery of the presence of human remains, the donor of the materials in question will be notified by [archives | collection] staff when possible. If the [archives | collection] determines that the material is not appropriate for acquisition, the donor may choose to have the materials in question returned. Should the donor choose not to reclaim the affected materials, [archives | collection] staff reserve the right to deaccession the material in question for transfer to [appropriate local agency].

¹ Human Remains policy adapted from Collection Management Policy of the 9/11 Memorial and Museum revision dated 13 May 2016.

² Penn Museum, "Statement on Human Remains," Accessed 2019-03-20.
<https://www.penn.museum/about-collections/statements-and-policies/human-remains>

[FULL LEGAL NAME OF ORGANIZATION]
USE AGREEMENT / USE POLICY / LICENSE AGREEMENT

The below sample provides examples of basic language to incorporate into your organization's use agreement. Please consult with your legal counsel to ensure you are in compliance with all laws and regulations prior to implementing a use agreement, policy, or license agreement (hereinafter use agreement). A use agreement alerts your users/researchers to how they may use and reproduce materials in your collections, strongly affirms the responsibility of users to respect and follow all intellectual property right laws and regulations including copyrights, and tells users exactly how you collect or mine data and what rights all parties have in these practices (this might be a separate companion policy). This agreement or policy should be consistent with archives professional ethics, standards, and best practices; and your collection development policy, privacy policy, deed of gift, take down policy, and data protection policy in compliance with all applicable local, state, federal, and international laws and regulations.

While **[full legal name of organization]** (hereinafter “**institution short name**”) collects **[donated and/or publicly available]** Internet materials including but not limited to websites, blogs, and social media posts, sometimes authors and publishers express a desire for their materials not to be included in the collections (by tagging a file for robot exclusion or by contacting the institution or the original crawler group). If the author or publisher of a portion of the **[name of collecting organization]** does not want his or her work in our collections, then we may remove that portion of the Collections without notice.

Digital content collected by the **[name of collecting organization]** may not readily be available for use due to donor restrictions such as but not limited to transferring legal title to the materials, organizational policy restrictions regarding privacy or sensitive materials, or by local, state, or federal law regarding privacy and confidentiality.¹

Because the content of the collections comes from around the world and from people and/or groups with varying opinions and different world views, the collections may contain information that might be deemed offensive, disturbing, pornographic, racist, sexist, triggering, misleading, fraudulent, or otherwise objectionable. The **[name of organization]** does not endorse or sponsor any content in the Collections, nor does it guarantee or warrant that the content available in the collections is accurate, complete, noninfringing, or legally accessible in your jurisdiction. and the undersigned user is solely responsible for abiding by all laws and regulations that may be applicable to the viewing of the content. In addition, the collections are provided to you on an as-is and as-available basis. You agree that your use of any and all **[name of organization]**

¹ This section's language is intended to make clear that legal hurdles prevent some materials from being shared or ownership transferred immediately, and it's always a good idea to maintain good relations with stakeholders in the event you have to wait for some materials to be released or transferred.

[FULL LEGAL NAME OF ORGANIZATION]
USE AGREEMENT / USE POLICY / LICENSE AGREEMENT

digital content and the collections is at your sole risk. You understand and agree that the **[name of organization]** makes no warranty or representation regarding the accuracy, currency, completeness, reliability, or usefulness of the content in the collections, that the digital content or the collections will meet your requirements, that access to the collections will be uninterrupted, timely, secure, or error free, or that defects, if any, will be corrected. **[name of organization]** make no warranty of any kind, either express or implied.²

By providing access to materials, or by supplying a reproduction of materials, the **[name of organization]** does not authorize publication of this material. Except in cases where items are already in the public domain, researchers must obtain the permission of the copyright holder before publishing, exhibiting, or broadcasting items found in **[name of organization]** collections. Some materials may be protected by other intellectual property or privacy laws. Though the **[name of organization]** might sometimes assist researchers in determining the rights relating to specific material, responsibility for determining copyright ownership or other rights rests solely with the researcher.³

Copyright Notice: The **[full legal name of organization]** does not hold the copyright to all of the materials in its collections. Any duplication of materials is subject to Title 17 of the U.S. Code which requires that reproduction of copyrighted materials may not be “used for any purpose other than private study, scholarship, or research.” If the **[name of the organization]** does not hold the copyright to an item being duplicated, it is the researcher’s responsibility to obtain permission from the publishing party. The **[name of organization]** makes no warranty or representation that any reproduction, distribution, performance, display, preparation of derivative works, or usage of the material here under is or will be free from infringement of the rights of third parties. By signing this Conditions of Use Agreement, the researcher accepts full responsibility and agrees to indemnify the **[full legal name of organization]**, its officers, employees, and agents from and against all claims made by any person asserting that his or her copyright protection has been infringed upon.⁴

In cases where the **[name of organization]** holds copyright of the material reproduced, the **[name of organization]** will consider providing a non-exclusive right to publication, exhibition, or broadcast. Researchers should complete and submit a use form. Permission to publish is

² Internet Archive “Terms of Use, Privacy Policy, and Copyright Policy”, <https://archive.org/about/terms.php>.

³ Connecticut State Library. “Permission to Publish, Exhibit, Broadcast, or Other Use Request Form.” July 24, 2018. <https://ctstatelibrary.org/wp-content/uploads/2018/07/Permission-to-Publish-form-enabled.pdf> (5 March 2019)

⁴ Robert C. Byrd Center for Congressional History and Education, https://www.byrdcenter.org/uploads/6/7/8/7/67873389/conditions_of_use_policy.pdf; CalTech, <https://archives.caltech.edu/access/sample-contract-new.pdf>

[FULL LEGAL NAME OF ORGANIZATION]
USE AGREEMENT / USE POLICY / LICENSE AGREEMENT

granted for the mutually agreed upon use as described on this form. In giving such permission, the **[name of organization]** does not surrender its own right to publish, exhibit, or broadcast the material. It is the responsibility of the researcher to determine if the item reproduced requires copyright permission from other copyright holders.⁵

Citation: When citing specific records from the collections, please use the following citation elements: [list all elements or a statement that an appropriate citation will be provided by the organization or other accepted citation style].⁶

In cases where there is a [significant amount/large number of items] of material from **[name of organization]** collections used in a publication, exhibit or broadcast, the **[name of organization]** should receive a courtesy copy of the item in which the material appears.⁷

If approved by the **[name of organization]**, the completed and signed use form contains the full and complete agreement between the applicant and the **[name of organization]** and it cannot be altered or amended except in writing, signed by the applicant and a duly authorized representative of the **[name of organization]**.

The laws of the State of _____ shall govern any disputes arising under this agreement.⁸

This Agreement, the Privacy Policy, and other policies posted on the Site and/or provided in person to the user constitute the full and complete agreement between you and the **[name of organization]** and are not intended to inure to third-party beneficiaries.

Please contact us with any comments or questions at **[organization email address and/or postal address]**.⁹

⁵ Connecticut State Library. "Permission to Publish, Exhibit, Broadcast, or Other Use Request Form." July 24, 2018. <https://ctstatelibrary.org/wp-content/uploads/2018/07/Permission-to-Publish-form-enabled.pdf> (5 March 2019)

⁶ Potential citation elements including but not limited to: item title; folder title and/or number; box number; accession number or identifier number; collection title; [full legal name of organization, city, state/province]. Date of Access. Source: Robert C. Byrd Center for Congressional History and Education, https://www.byrdcenter.org/uploads/6/7/8/7/67873389/conditions_of_use_policy.pdf

⁷ Institutions will need to codify what a significant amount or large number of items mean in implementing this section.

⁸ Connecticut State Library. "Permission to Publish, Exhibit, Broadcast, or Other Use Request Form." July 24, 2018.

⁹ Internet Archive "Terms of Use, Privacy Policy, and Copyright Policy", <https://archive.org/about/terms.php>.

Digital Submissions Terms and Conditions

You are being asked to contribute your recollections, photographic images, video, social media postings or other digital content to [insert institution here], which is creating a digital record of the [describe event, location, and date(s) here].

You may only submit material created entirely by you and not copied from or based, in whole or in part, upon any other photographic, literary, or other material, except to the extent that such material is in the public domain, or you have permission of the copyright owner, or its use is allowed by "Fair Use" as prescribed by the terms of United States copyright law. If you would like to refer or nominate material which you do not own, please contact us at [insert email address or link to google nominating form].

You must be 18 years of age or older to submit material. By submitting content through this form, you are granting [insert institution here] permission to disseminate, preserve, and use that content in connection with its educational and research mission, including promotional purposes, in all media in perpetuity. You retain ownership of and copyright in the material you share.

If you indicate on the form that your submission is "public," your material may be published on the web (with or without your name, depending on what you have indicated) as part of [insert institution here] digital collections or exhibits. Otherwise, your material will only be available per [insert institution here] guidelines.

Submitted material must not violate any confidentiality, privacy, security or other laws. Please be aware that all submissions and any information associated with the submissions (email address, descriptive information, etc.) may be provided to federal, state, or local law enforcement or other government agencies pursuant to a lawful subpoena or otherwise as required by law.

[Insert institution here] is not obligated to include your content in this project or preserve it in perpetuity. Decisions to decline submissions will adhere to the guidelines of the institution's/collection's collecting policy and deaccession policy.

Please choose one of the following and initial:

My submission may be "public" and included in publications, digital collections, and exhibits and may include my name. If yes, please initial here: _____

My submission may be "public" and included in publications, digital collections, and exhibits but should be listed without my name/anonymously. If yes, please initial here: _____

My submission may not be public and made available in publications, digital collections, and exhibits, but is available for research and use per institution guidelines. If yes, please initial here: _____

Digital Submissions Terms and Conditions

Name _____

Signature _____

Date _____

Digitization Guidelines Bibliography

This bibliography of resources is provided for consultation when undertaking any digitization project.

Association for Library Collections and Technical Services, Preservation and Reformatting Section. "Minimum Digitization Capture Recommendations." June 2013.

<http://www.ala.org/alcts/resources/preserv/minimum-digitization-capture-recommendations> (6 March 2019)

Recommendations for minimum digitization capture settings for static media, audio, video, and textual materials. Includes appendices of references to additional guidelines.

Connecticut State Library. "Digital Imaging Standards." 2014.

<http://ctstatelibrary.org/wp-content/uploads/2015/05/DigitalImagingStandards.pdf> (6 March 2019)

The standards while specific to Connecticut state and local government agency requirements for digitization of public records include sections such as file format, imaging resolution, digital imaging planning and implementation, and references for further technical information regarding digitization.

Council of State Archivists. "Digitization Projects." August 2017.

https://www.statearchivists.org/files/6015/0272/2035/COSA_DigitizationProjects_final.pdf (6 March 2019)

The Tools and Resources Subcommittee of the Council of State Archivists presents a three-part module on the best practices for managing digitization projects. The decision to digitize records and the choice of a method to do so are not as simple as putting an item on a scanner and pressing go; to be highly successful, this process requires thoughtful research, preparation, and studious project management. This document is organized into three broad categories. Each category includes the strategies and best practices of highly successful digitization projects. Though the parameters for each project will differ greatly — budget and resources, source and amount of funding, type of material to be digitized, descriptive requirements, preservation activities — these best practices will produce a project management framework that is flexible enough to be applied to projects of all sizes and scopes.

Digital Public Library of America. "Self Guided Curriculum for Digitization." 2015.

<https://dp.la/news/new-self-guided-curriculum-for-digitization/> (6 March 2019)

This resource consists of six curriculum modules for digitization projects created as part of the Digital Public Library of America's Public Library Partnerships Project. Modules include: Planning for Digitization, Selecting Content for a Digitization Project,

Digitization Guidelines Bibliography

Understanding Copyright, Using Metadata to Describe Digital Content, Digital Reformatting and File Management, and Promoting Use of Your Digital Content. Modules include video presentations.

Federal Agencies Digitization Guidelines Initiative (FADGI), Still Image Working Group, <http://www.digitizationguidelines.gov/> .

Guidelines for Twitter Capture

Setting up Twitter API and captures is an intimidating process, please remember that you can reach out to colleagues or friendly IT folk to help! As social media applications change quickly, and it is likely institutions will rely upon the department(s) designated to deal with digital and electronic resources for assistance. If you do not have a “designated department,” please consider contacting your local library, history center, university, tech savvy friend or community member, etc. for assistance.

The list here offers links to best practices and guidelines gleaned from those available in the Fall of 2018; we hope to add and update this as technology and the availability of tools expand and change.

Twitter’s Application Programming Interface (API):

It is recommended to consider Twitter’s Application Programming Interface (API). The API presents the “raw” data behind each tweet – the tweet’s visible textual content – along with metadata associated with it (date, time, user account, users mentioned and so on). See <https://support.twitter.com/articles/20170160>

Social Feed Manager (SFM):

George Washington University Library developed Social Feed Manager for scholars, citizens, and archivists to capture, preserve, and study the constantly evolving records that are generated when people and corporate bodies use social media services. SFM sends requests to Twitter’s Application Programming Interface (API), then stores the responses as a machine readable version of the tweet in JSON format. If the user instructs it, SFM then uses the web harvester Heritrix to request related resources such as embedded images, profile images, and referenced webpages.

The report on SFM provides comparison of other existing approaches to archiving twitter feeds, such as ArchiveIT, ArchiveSocial, Hydrator, Gnip, Lentil, Smarsh Archiving Platform, Twarc, WebREcorder, and Twitter Archiving Google Sheets.

For the report on the SFM, see

<https://gwu-libraries.github.io/sfm-ui/resources/SFMReportProm2017.pdf>

To download the program, see URL:

<https://gwu-libraries.github.io/sfm-ui/>

Web Content Crawling Permission Form

This permission form may need to be reviewed by your institution's legal council before use. This form is designed to easily convert to a Word document, PDF, or to be copied and pasted into a web-based form.

The following form is for use by site owners identified by [institution]. If you have received a request from [institution] to archive your web content, please complete the form. If you have not received a request from [institution] and you are interested in having your site archived, please contact [staff contact information].

Required fields are indicated by an *:

*URL:

COLLECTIONS:

PERMISSION REQUEST

- *Acceptance to Archive Web Content

I grant permission for [institution] to archive all web content available at the URL identified above (including digital publications and other digital content such as audio and video), as well as other portions of my website.

- Yes, I grant permission.
- No, I do not grant permission.

- *Acceptance to Provide Access

I grant permission for [institution] to provide public access to the archived version of the web content.

- Yes, I grant permission.
- No, I do not grant permission.

CONFIRM YOUR CONTACT INFORMATION

(your contact information will not be shared)

*Contact Name:

*Email:

*Phone Number:

Web Archiving Permission Templates

NOTICE/NO PERMISSION REQUIRED TO CRAWL

Provides notification to website owner/creator to inform of intent to crawl and provide public access when legally possible. Please consult with your own legal council before using.

To Whom It May Concern:

The [repository name] has selected your website for inclusion in the historic collection of digital and web materials related to the [event]. Your website was identified to be an important part of this collection and the historical record.

The following URL has been selected for archiving:
[url]

In order to archive this URL we may archive both this URL and other portions of your site, including public content that your page links out to on third party sites such as Facebook, YouTube, etc. The [repository name] or its agent will engage in the collection of content from your website at regular intervals over time and may include it in future collections.

The [repository name] will make this collection available to researchers at [repository name] facilities and by special arrangement. The [repository name] may also make the collection available more broadly by hosting the collection on the [repository name]'s public access website. The [repository name] hopes that you share its vision of preserving web content related to [event] and permitting researchers from across the world to access them.

If you have questions, comments, or recommendations concerning the web archiving of your site, please email the [repository name] at [email address] at your earliest convenience.

Thank you.

[repository name signature]

Web Archiving Permission Templates

NOTICE/PERMISSION

Provides notification to website owner/creator to inform of intent to crawl and asks permission to provide public access when legally possible. Please consult with your own legal council before using.

To Whom It May Concern:

The [repository name] has selected your website for inclusion in the historic collection of digital and web materials related to the [event]. Your website was identified to be an important part of this collection and the historical record.

The following URL has been selected:

[url]

In order to archive this URL we may archive both this URL and other portions of your site, including public content that your page links out to on third party sites such as Facebook, YouTube, etc. The [repository name] or its agent will engage in the collection of content from your website at regular intervals over time and may include it in future collections. The [repository name] hopes that you share its vision of preserving web content related to [event] and permitting researchers from across the world to access them.

Please provide the [repository name] with permission to provide public access to the archived versions of your website, by filling out the form available here:

[acceptance_url]

If you have questions, comments, or recommendations concerning the web archiving of your site, please email the [repository name] at [email address] at your earliest convenience.

Thank you.

[repository name signature]

Web Archiving Permission Templates

PERMISSION/PERMISSION

Asks permission to crawl website and permission to provide public access when legally possible. Please consult with your own legal council before using.

To Whom It May Concern:

The [repository name] has selected your website for inclusion in the historic collection of digital and web materials related to the [event]. Your website was identified to be an important part of this collection and the historical record.

The following URL has been selected:

[url]

We request your permission to collect your website and add it to the [repository name]'s archival collections. In order to ethically archive this URL we would appreciate your permission to archive both this URL and other portions of your site, including public content that your page links out to on third party sites such as Facebook, YouTube, etc. With your permission, the [repository name] or its agent will engage in the collection of content from your website at regular intervals over time and may include it in future collections.

In order to archive this URL we may archive both this URL and other portions of your site, including public content that your page links out to on third party sites such as Facebook, YouTube, etc. The [repository name] or its agent will engage in the collection of content from your website at regular intervals over time and may include it in future collections. The [repository name] hopes that you share its vision of preserving web content related to [event] and permitting researchers from across the world to access them.

Please provide the [repository name] with permission to provide public access to the archived versions of your website, by filling out the form available here:

[acceptance_url]

If you have questions, comments, or recommendations concerning the web archiving of your site, please email the [repository name] at [email address] at your earliest convenience.

Thank you.

[repository name signature]

Website Archiving Nomination Form

The [name of institution and department name] is collecting information on websites and other digital material documenting response to [event].

Recognizing that [name of institution] would like as full coverage of the [event] as possible, we ask that you submit the following information about websites you have discovered that are relevant to this topic.

Seed URL _____
(Please include a / at the end of any Facebook, YouTube, or Twitter URL)

URL Title _____

URL Type

____ News Article

____ Blog

____ Social Media

____ Video

____ Website

____ Other

Subjects

(Please choose all applicable subjects)

[Archives to provide listing of subjects]

If you would like to be contacted about this submission, please provide your name and email information:

Resources to Support Archivists Working with Tragedy/Disaster-Related Collections

Creating and caring for tragedy and disaster-related archives and collections not only requires physical labor, but also emotional labor. The act of gathering, processing, managing and preserving collections may affect the professional and personal well-being of archivists who have been exposed to such objects and materials, especially those who are also a part of the affected communities.

Managers and supervisors should not only be aware of the potential trauma employees may be exposed to while working with tragedy-related collections. As part of your responsibility as a supervisor, please ensure that current and potential staff and volunteers are aware of the emotional labor involved before formalizing work assignments. Managers should actively work with Human Resources and other administrators to incorporate such awareness into job descriptions; reduce exposure, such as in alternating time spent on project; and provide support and resources to employees and volunteers.

If you or your colleagues, staff, interns, or volunteers are experiencing emotional distress or health challenges due to exposure to tragedy or disaster-related objects and materials, it is important to seek support from either your community, family, friends or a healthcare provider. It is recommended that if an organization is relying on unpaid labor that it be cognizant of the ethical implications of exposing individuals to trauma collections when access to health insurance or employee assistance programs are not available.

You may want to consider seeking support from your employer for those who may not have insurance or access to mental health providers. Ask your Human Relations department to provide a listing of institutions and organizations that provide free, confidential services from experienced, licensed counselors. For staff work with your Human Relations department to learn more about an Employee Assistance Program (EAP). The EAP offers a variety of resources, including legal and financial services, to help assist you with professional and personal problems of all kinds. Your Human Resources Department at your institution, or your health insurance company, should be able to tell you if an EAP is available.

The following list below are some additional resources related to grief, trauma, and self-care that may be helpful to you and/or your colleagues.

Grief:

The [Grief Recovery Helpline](#) offers counseling, referrals, support and publications. They can be reached toll free at 1-800-445-4808.

Resources to Support Archivists Working with Tragedy/Disaster-Related Collections

[Navigating Grief: A Guidebook for Grief Awareness & Understanding](#) is an online resource from LearnPsychology.org that defines what grief is including the myriad types, stages, and symptoms of grief.

The [University of Minnesota Extension](#) website provides mental health and wellness tips, online courses and resources for understanding the [five stages of grief](#) and [coping with stress](#).

Trauma:

The [National Center for Post-Traumatic Stress Disorder \(PTSD\)](#) is dedicated to research and education on trauma and PTSD, and provides resources to support PTSD victims and survivors. For immediate help call 1-800-273-8255.

The [Vicarious Trauma Toolkit](#) created by the DOJ Office of Justice Program' Office for Victim of Crime focuses on organizational responses to work-related exposure to trauma. While it is geared towards emergency first responders, it does provide some applicable content that can be used to support archivists, allied professionals, and volunteers working with tragedy-related collections.

The [Trauma Stewardship Institute](#) founded by Laura van Dernoot Lipsky, author of [Trauma Stewardship: An Everyday Guide to Caring for Self While Caring for Others](#), focuses on raising awareness of and responding to the cumulative toll on those who are exposed to the suffering, hardship, crisis, or trauma of humans, living beings, or the planet itself. Her book and 2015 Tedx Talk, "[Beyond the Cliff](#)," outlines the warning signs of trauma exposure response and provides resources for healing and creating a self-care practice.

Self Care:

The [American Psychological Association](#) provides information for finding a licensed counselor and offers a wealth of tips including ways to [strengthen your support network](#), [recover emotionally from disasters](#), and [build resilience to manage indirect exposure to terror](#).

The [Self-Care Starter Kit](#) created by SUNY Buffalo School of Social Work offers tips and strategies to help develop a self-care plan as well as exercises and activities to prevent, manage, and reduce stress and burnout.

Resources to Support Archivists Working with Tragedy/Disaster-Related Collections

mindbodygreen.com offers a 360 degree approach to wellness that incorporates mental, physical, spiritual, emotional, and environmental well-being. The website also provides a rich resource of free content including articles, video classes, and trainings to support your practice.

[Insight Timer](#) is a free app for iOS and Android with a large selection of audio tracks to choose from, including guided meditations, music, and talks by teachers.

[Yoga.com Studio](#) is an app for iOS and Android that provides a variety of programs for all levels, yoga poses with descriptions and photos, and breathing exercises to help reduce stress.

Oral History Creative Commons Permission Form Using By Attribution — NonCommercial — Share Alike License

I give [name of collecting organization] the right to openly share, preserve, and archive the oral history I have completed with [name of interviewer].

As part of [name of project], I allow my oral history to be transferred to an archive with institutional or organizational support in order to sustain its and other's access and longevity.

I understand that this archival storage is being done for the purpose of study by others.

I understand that my interview (and other items as listed below) may be distributed to the public for educational purposes, including via print, public programming, and the internet.

I agree to freely share my interview (and other items as listed below) under the terms of a [Creative Commons Attribution-NonCommercial-ShareAlike 4.0 Unported License](#). This means that I retain the copyright, but that the public may freely copy, modify, and share these items for non-commercial purposes under the same terms, if they include the original source information.

In return, the [name of collecting organization] promises to send one free copy of the interview recording, transcript, and related items to my address below.

If items are donated during interview, please identify below:

Interviewee:

Print name

Signature

Address

Date

Interviewer:

Print name

Signature

Address

Date

ORAL HISTORY RELEASE FORM

Participant's name:

Mailing address:

Phone/email:

I voluntarily agree to participate in the [Interviewee Name] Interview on [Date], for the [Repository]. I acknowledge that the [Repository] is conducting oral history interviews regarding [event] with the intent of making them available to users for an ongoing or indefinite period of time. I understand that to accomplish this, the following items may be created from my interview:

- a preservation master copy and user copies of the recording
- reformatted copies of the recording that meet changing technological and archival standards
- an edited transcript and summary

Participant's signature:

Date:

[Repository Name] Representative's signature:

Date:

ORAL HISTORY COPYRIGHT AND LICENSING

Participant's name:

Mailing address:

Phone/email:

Copyrights and rights of reproduction to these materials will be governed by United States copyright law. The Participant may transfer the work to the public domain, transfer the copyrights to the Library, or the Participant may retain the copyrights:

(PLEASE CHECK ONE)

_____ I hereby transfer this work to the public domain. I fully understand that this interview will not be copyrighted by me or the [Repository], but will be placed in the public domain. This decision is intended to provide maximum usage by future researchers.

_____ I hereby transfer copyright to the [Repository], which grants me a non-exclusive license for the complete and unrestricted right to reproduce, publish, broadcast, transmit, perform or adapt the interview.

_____ I retain the copyright to this interview and grant a non-exclusive license to the [Repository], for distribution to the public for non-commercial, educational purposes, in formats and settings that include, but are not limited to, print and electronic publications, events and exhibitions, and online. The [Repository] may direct patrons requesting to use the interview for commercial purposes or purposes not allowed under Fair Use (Section 107, Title 17, U.S. Copyright Code), to the following address:

Participant's signature:

Date:

[Repository Name] representative's signature:

Date: