

Donor Form/Deed of Gift Worksheet

Digital Stewardship Curriculum

Use the following prompts as an aid in creating a Donor Form or Deed of Gift. You can also use this process to consider what you might include in a donations section in a policy or for donor information on a public facing website. These prompts are intended to help you think through policy and form creation for your institution, and are not meant to be prescriptive. Research donor forms at other institutions for more assistance.

What types of materials are you able to accept?

What kinds of media can you play or digitize with the equipment you have? If you need to purchase equipment, is it readily available?

What items do you NOT want to accept?

What does not fit within your collecting scope? Will you be deaccessioning materials that do not fit with your collecting goals or preservation capabilities? How will you educate donors about this information?

Who in your department is responsible for deciding whether or not to accept a collection?

What sorts of levels of access will you apply to collections?

Will you accept any and all restrictions the donor wants placed on the material? Do you already have suggested levels of access that already make sense in your culture and community? How will these restrictions be enforced? Think about in-person and online access restrictions.

Will you have any cultural, sacred, or community specific practices considerations for collections to share with donors?

What will you do if a donation requires special storage areas, practices, or access restrictions?

How do you want people to donate collections?

Can donors come drop them off at any time during business hours? After hours? Should they call or email first? Will you go out to look at a collection in someone's home or workplace?

Will you require or encourage monetary donations along with the materials to cover the cost of processing the collections?

Or will you provide donors with a guide of how to prepare collections before donating?

How will you navigate rights and intellectual property?

How will you educate donors about these topics?

What sorts of benefits should the donor be granted?

How might you show your acknowledgement and appreciation of their gift? A thank you letter? An example of added benefit might be the ability to request copies of the collection free of charge. It is good to be specific about what donors can expect, so that they are not let down if their expectations of service are not met at a future visit.

What information do you want to collect about the materials from the donor?

Their knowledge about the materials and surrounding history may be essential in describing and organizing the collection. You may only have a small window of time to meet with them and gather this surrounding information. How can you prepare yourself and your staff?

Suggestions of sections to include on your Donor Form/Deed of Gift:

This list is not exhaustive, but includes ideas for sections from a variety of institutions. Please note that you should attempt to keep your donor form brief and to the point. Create a balance as you inform donors of necessary information/questions, and avoid overwhelming them with multiple pages of text.

- Goal of form, mission of institution/department
- Name and contact information of donor
- Next of kin or designated contact if needed
- Name of your institution
- Title of the material
- Description of the material
- Dates of materials
- Quantity of material (physical and digital)
- Preservation/conservation notes
- Conditions of deposit
- Access restrictions
- Storage and care needs
- Cultural needs or specific care for items
- Additional materials
- Items that may have been separated
- Transfer of ownership or other conditions of ownership/care
- Transfer of copyright/intellectual property or other conditions of copyright/intellectual property
- Note on digitization and online publication
- Note on deaccessioning or disposal of unwanted materials
- Date of acquisition
- Signatures of both donor and archivist/curator/librarian