

Type of Policy: Archives

SUBJECT: Archives Donation Policy				
NEW June 2020	APPROVED Sept. 16, 2020	EFFECTIVE DATE Immediate	REVISED Sept. 13, 2020	POLICY NUMBER 04

## Policy

The Archives acquires and appraises materials through donation and repatriation, which is considered a type of donation.

## Definitions

**Appraisal:** The process of determining whether materials offered to the archives have enough value to be accessioned.

**Accession:** To take physical and legal custody of materials.

**Accrual:** An addition to a collection.

**Deaccession:** The process of permanently removing accessioned materials from the archives.

## Procedure

The donor, if not a congregational member, must complete a *Deed of Gift* under which the donor agrees that the materials in the donation are original, that the donor has right, title, and interest to give these materials, and that the materials are free of all liens, claims and encumbrances.

Furthermore, the donor agrees that the material has not been imported or exported into or out of another country contrary to its laws. The donor waives the right to monetary compensation or tax credits for the donation. Physical ownership and copyrights in which the donor has a legal right are transferred to the Archives, and the donor's moral rights are extinguished. The Archives may use and dispose of the donated records as it sees fit. The donor agrees to transfer any accruals to



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the donated records on a regular basis under the same terms and conditions of the *Deed of Gift* unless otherwise negotiated.

The Congregational Archivist can appraise donated materials for a monetary value up to \$1,000, or less, for insurance purposes, but must document the source(s) used to determine the fair market value.

The Congregational Archivist is responsible to appraise a donation and determine whether to accept it based on the *Mission Statement* and *Collection Policy*.

All decisions taken in deciding whether to accept a donation shall be documented in the accession record.

Donors may be referred to another collecting repository if the donation is refused.

If at some point, the donation is deemed non-archival, the Congregational Archivist may decide to return it to the owner, transfer it to another organization, sell it at public auction for fair market value, or destroy it.

### **Review**

This policy will be reviewed every three years.

### **Benchmarks:**

This policy is effective if records of enduring value exclusively are accepted for donation to the Archives, but if not, the congregation risks financial loss through expenditures on staff time, supplies and storage space. Ownership and copyright, and the right to deaccession donations will be clearly stated to potential donors thus eliminating liability risk to the congregation.



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### **Responsibility**

This policy is owned and supported by the Congregational Leadership Circle. The Congregational Archivist is responsible for the management and support of this policy. Congregational members and external donors are responsible for donating records to the Archives.

### **Documentation**

Deed of Gift

Mission Statement

Collection Policy

### **References**

Pearce-Moses, R. (2005). *A Glossary of Archival and Records Terminology*. Chicago: Society of American Archivists.