



## Collecting Records

### CHURCH HISTORY GUIDES

COLLECTING,  
PRESERVING,  
AND SHARING  
CHURCH HISTORY



# Collecting Records

## CHURCH HISTORY GUIDES

Published by  
The Church of Jesus Christ of Latter-day Saints  
Salt Lake City, Utah

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Printed in the United States of America. English approval: 2/18  
PD50035891

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# Introduction

On April 6, 1830, the day the Church was organized, the Lord commanded that a record should be kept (see D&C 21:1). In 1831 He indicated that the Church historian “may . . . obtain knowledge . . . [by] writing, copying, selecting, and obtaining all things which shall be for the good of the church, and for the rising generations” (D&C 69:7–8). Since that time, the Church has collected records from around the world, gathering and preserving information and memories that might otherwise be lost. Keeping and appropriately sharing records can bring people closer to Christ by helping them remember the “great things the Lord hath done,” strengthening their resolve to live the gospel, and providing them with patterns for overcoming adversity (title page of the Book of Mormon).

It is vital that you receive sufficient training prior to collecting records so you'll know how to properly acquire them.



Your collecting efforts will focus on serving the needs of the Church as an institution. You should not try to collect everything related to the Latter-day Saint experience; rather, focus on collecting records that contain historically significant information that may one day support Church operations and products. You will work closely with your contact in the Church History Department to plan and implement collecting projects. Defined projects will help ensure that your efforts are aligned to area and department priorities and that you do not overrun limited resources. Most of your efforts will be in fulfillment of your planned projects, but there will be times when responding to unforeseen opportunities will result in valuable records.

It is vital that you receive sufficient training prior to collecting any records. This training will come in the form of a basic training program and ongoing one-on-one mentoring from a Church History Department representative. Familiarize yourself with the basic concepts and terms in the appendix before starting your training program.

Collecting records is a three-step process in which you will prepare, collect, and deliver or transfer the records.



The entrance to the Church History Library in Salt Lake City displays the commandment to keep a record.

# Preparing to Collect Records

**T**O EFFECTIVELY COLLECT RECORDS, you should become familiar with the history of the Church in your area of responsibility so you can make informed decisions about what to acquire. You will also want to complete the basic training program, which will be administered by a Church History Department staff member or an experienced person in your local area. Additional assistance can be found in the Collecting Records section at [history.lds.org/adviser](http://history.lds.org/adviser).



Resources to help you learn Church history are available online at [history.lds.org](http://history.lds.org).

## Learn Church History

Serving in a Church history capacity requires that you obtain a basic knowledge of both local and general Church history so you can better appraise potential acquisitions. Ask your area Church history adviser or your contact in the Church History Department for basic Church history information about your area of responsibility.

“Wherefore, now let every man learn his duty, and to act in the office in which he is appointed, in all diligence.” (D&C 107:99)

## Complete Basic Training

To help you get started, you’ll need to complete a basic training program. The program involves reading and viewing training materials that describe the work of collecting records. It also involves implementing or practicing what you learn. This program is intended to be accomplished over several months if you dedicate approximately two to three hours per week. The training program can be accessed on the Church history adviser website at [history.lds.org/adviser](http://history.lds.org/adviser).

(Left) Becoming familiar with the history of the Church in your area of responsibility will improve your ability to identify desired records.

# Collecting Records

1. Develop a project
2. Meet with potential donors
3. Assess potential records
4. Complete the donation agreement
5. Create a case file

**A**S YOU BEGIN collecting records, and throughout your service as a Church history specialist, you will work closely with a Church History Department staff member or an experienced person from your local area to develop and implement collecting projects. Collecting records generally involves developing a focused project, meeting with potential donors, assessing their records to see if they fit our collecting scope, having them sign a donation agreement, and creating a case file to document your efforts.



## Develop a Project

A collecting project provides focus and allows you to develop expertise. Projects are initiated in partnership with the Church History Department and will focus on collecting foundational records that document key events and important people in your area of responsibility. Most projects will include a list of targets (people, organizations, locations, and so on) that you will systematically work through to see if there are records of interest to the Church. When no records exist, it may be appropriate to record an oral history (see *Church History Guide: Oral Histories* for more information). There may be times when opportunities arise that are not part of a project. On such occasions, you should seek direction from your contact in the Church History Department.

Examples of potential projects include collecting:

- Personal records from participants in a major historical event, such as the dedication of a temple or the creation of a new stake.
- Publications from local Church units, such as anniversary books or histories.
- Personal records from returned mission presidents and their wives living in your area.
- Important local Church records stored in meetinghouses.
- Personal records from Church members in your area that document important Church events.

Having a letter of introduction from the Area Presidency or Church History Department is helpful when you collect records because it informs priesthood leaders and potential donors that your work is endorsed by the Church.

## Meet with Potential Donors

Acquiring records for the Church is an important responsibility. Not only are you making a long-term commitment of Church resources, you are often dealing with someone's treasured personal records. Treat people and their records with great respect. When arranging to meet a potential donor, be sure to explain who you are, who you represent, and why you are interested in meeting with them. Dress as if you were going to Church, and meet in a safe environment. Be sure to thank potential donors for their interest in helping the Church collect its history, even if what they are offering falls outside the collecting guidelines. Respect the donor's time, but don't rush the meeting. It takes time to build trust and to adequately assess records. For more information, see the video "Conducting a Respectful Donation Meeting" and the e-learning course "Unsolicited Donation Offers" found on [history.lds.org/adviser](http://history.lds.org/adviser).

Remember that you represent the Church and that all the records you acquire belong to the Church. Do not agree to take records that fall outside the Church's collecting scope for your personal use, even if the donor encourages you to take them.

## Assess Potential Records

Assessing potential records, or record appraisal, is the act of determining whether records fit within the scope of the Church History Department's collection. Record appraisal is based primarily on the historical significance and anticipated use of the information a record contains, but several factors, explained later, should be considered. Consult with the Church History Department whenever you are unsure whether to acquire a record.

Never agree to acquire records before you have seen them. Schedule an appointment to evaluate potential records at a location where the owner feels comfortable, such as his or her home or a Church building. Be prepared to acquire the records by bringing the donation agreement and by arranging adequate transportation and boxes to carry the records. Take sufficient time to appraise the records that are being offered.

Do not acquire large collections (more than one meter in size) without receiving permission from the Church History Department. Consult with the Church History Department before acquiring records that have been damaged beyond the point of usefulness or that have been contaminated by mold or insects. However, some wear and tear is acceptable. For more information, see the e-learning courses "Evaluating Records" and "Evaluating Records Practice" found on [history.lds.org/adviser](http://history.lds.org/adviser).

The Church does not normally purchase personal or local Church records. The Church does, however, selectively purchase publications and, on occasion, rare books, pamphlets, art, and artifacts. When these opportunities arise, consult with the Church History Department for direction. Always receive permission from the Church History Department before purchasing records.

Generally, we want only one copy of a record in the Church History Department's collection, especially when we have permission to digitize it. To avoid collecting unnecessary copies,



Take the time necessary to ensure the records meet the criteria outlined in this guide.

check the Church History Catalog (accessible at [churchhistorycatalog.lds.org](http://churchhistorycatalog.lds.org)) and consult with your contact at the Church History Department before acquiring any reproduced records, which include published materials and records offered as photocopies or digital copies. In rare cases, you may be instructed to acquire duplicate copies of select materials, so consultation is important.

To simplify your appraisal decisions, this guide provides specific instructions for four different categories of records. Follow these directions carefully, but whenever you feel an exception should be made, contact the Church History Department for direction.

## Saying No

Not all records should be acquired. You may be offered records that fall outside our collection scope. In most of these cases, you should decline the offer and suggest alternative methods for preserving and sharing the records, such as preserving the records themselves, uploading the records to FamilySearch, or donating them to another institution. Records, such as genealogical research, books about a culture or country, or photographs of landscapes and buildings that are not Church related, fall outside our collecting scope and should not be acquired.

Sometimes a donor offers a collection in which a few of the records fall outside our collecting scope, if so, do the following:

- When the donor is the creator or compiler and only some of the records fall within the collecting scope, you'll need to separate the out-of-scope portion and kindly say to the donor something like, "Thank you for your willingness to help the Church. These records (pointing to those that fall within scope) are just what the Church is looking for. These other records (pointing to the out-of-scope items) fall outside the scope of the records the Church wants to collect. Therefore, I'll leave them with you."
- When the donor is not the creator or compiler, to respect original order, keep the collection together rather than altering the way the creator organized and arranged the records. In this case, you'll need to evaluate the collection as a whole. In doing so, discuss these questions with your contact at the Church History Department: What do we know about the collection and who created it? Who donated it, and what is his or her relationship to the creator? How important is the part of the collection that is within our collecting scope? How large is the in-scope portion compared to the out-of-scope portion?

## Think Digital Records First, but Not Digital Only

The Church History Department generally prefers to acquire records in a digital format because they can be shared efficiently with a worldwide audience. Digital records also require less storage space, which is very limited in some areas. Therefore, in many cases (see exceptions below), the department acquires records in a digital format (digitally born, digitized by donor, or digitized by us and returned to donor) instead of in the original hardcopy format. However, this digital-first approach should not be understood as a digital-only philosophy.

The digital-first strategy should not encourage a different approach to record appraisal. Use the same care and instructions when appraising the value of a digital record as when appraising a physical record. Do not treat digital records



Transfer media for digital records (USB flash drives, hard drives, CDs, and so forth) may be needed as the records are acquired but will not be retained permanently.

differently because of how easily they can be acquired. When you are offered records produced using a computer (digital-born), ask the donor if he or she has the digital file. When possible, acquire the digital file instead of the hardcopy version.

Most records are valued because of the information they contain and not because of the medium (paper, film, tape, and so forth) that holds the information (see exceptions listed below). Therefore, digitizing the record and returning the original to the donor can be a good way of acquiring information without acquiring the physical item. Digitizing is often more time-consuming than acquiring physical records, and it requires specialized equipment and training. Therefore, digitizing work is generally done at the Church History Library in Salt Lake City, by a professional contractor, or at a records preservation center.

When borrowing records so they can be digitized, be sure to fill out the donation agreement completely, including where and how to return the records. You are responsible to ensure the records are moved in a safe manner from the donor to a location where they can be digitized and then back to the donor again. Moving the records can be done in person or by using a reputable shipping company. Take care not to disrupt the original order and arrangement of the records when moving or shipping them.

Some records have artifactual value in addition to their informational value. In the following circumstances, records should be acquired in their original formats:

- Records closely associated with General Authorities and General Officers of the Church
- Records, including artifacts, that could be used in a Church-produced display documenting significant historical events, developments, places, or people.
- Records that are scarce, unique, and significant due to their age or physical condition; generally, these records predate the computer age.
- Original artwork.
- Records from local Church units and patriarchs, Church leaders or employees, and temples that should have been sent to the Church History Department according to previous or existing policies.
- Records that should be removed from public access in order to protect their sacred nature, such as temple clothing and temple recommend books.

Some records cannot be digitized because the Church did not receive the necessary permissions, the record's condition or size makes it unmanageable, or the available equipment is incapable of capturing the records adequately. In these cases, the original record should also be collected.

## Assessing Personal Records

The Lord has directed that we “continue in . . . making a history of all the important things . . . concerning [the] church” (D&C 69:3). This scripture implies the need to be selective and focus on records concerning the Church instead of collecting every available record.

Therefore, we prioritize collecting records that have broad historical significance to a large number of Church members over those that have narrow implication to a family or individual. When appraising records, ask yourself, “How many members will think these records have historical significance?” Don’t ask, “Is this record important to someone?” as this question will encourage you to acquire almost everything.

The types of personal records we want to collect include information about the establishment and development of the Church in areas throughout the world. Records containing information relating to the following people, places, events, and developments should be sought after. Projects that combine multiple points from the lists below may be a better use of your limited resources.

**People:** Records from the following categories of people are likely to be of interest to the Church, especially when they also capture information about the places, events, and developments outlined below. Generally, journals, correspondence, scrapbooks, personal histories, personal papers, photographs, and audiovisual records are good sources of historically significant information, but other types of records, if they exist, should be assessed.

- General Authorities, General Auxiliary Presidency members and board members, and Area Seventies (including spouses).
- Mission presidents and their wives and temple presidents and matrons.
- Men and women, throughout the world, closely associated with the places, events, or developments listed later in this section.
- Early missionaries in or from a country or region and those who directly supported them; early is generally defined as the time before the first stake was created in a country or region.
- Church employees, missionaries, expatriates, and people of other faiths who were instrumental in helping the Church become established in a country or region (loosely defined as the time before the first stake was created).
- Church members who have substantially documented their faith and Church experiences, such as in a missionary journal or autobiography.
- Church members whose Church experiences have been documented in published works.

### Additional Guidance

- Be selective when offered large quantities of similar records. For instance, do not acquire hundreds of photographs from a single activity; rather, select the most relevant one or two dozen photos.
- It is helpful if the creator organizes, arranges, and identifies his or her records before donating them.
- Normally, family group sheets, pedigree charts, and similar genealogical documents are not collected by the Church History Department. The valuable information these records contain should be entered into FamilySearch instead.
- When acquiring audiovisual records, it is important to record on the donation agreement both the recording format (MP3, MP4, WAV, PAL, SECAM, and so on) and the physical storage medium (LaserDisc, CD, DVD, audio- or videocassette, and so on).

**Places:** Records related to the following categories of Church historic places are likely to be of interest to the Church. Church historic places provide an important geographic or structural context for the Restoration.

- Sites of significant firsts (for example, Restoration events, baptisms in a region, meetings between government and Church leaders, dedication sites, meeting places in a city, and so on).
- Sites related to the significant events and developments listed below (for example, Latter-day Saint settlements, sites of persecution, Church meetinghouses, mission homes, offices, temples, structures with architectural and artistic importance, and so on).
- Sites where historical markers or monuments have been placed.

**Events and Developments:** Records related to the following classifications of events and developments are likely to be of interest to the Church, especially when they are recorded by someone mentioned in the earlier list.

- Early events and developments associated with the Restoration.
- Periods of noteworthy growth and challenges and all other formative and impactful events and developments of the Church within a country or region; this includes the time prior to the creation of the first stake in that country or region.
- Organization, divisions, and discontinuations of Church units—such as the organization of the first group or branch in a city, the first mission and stake in a country, and the creation of all new stakes. Generally, the annual history program and other Church systems should capture leadership changes in a stake and ward, even for divisions and discontinuations. However, when there are not sufficient capabilities to rely on the annual history program, targeted collecting may be warranted.
- Organized temple trips and temple service of members within a country or region, prior to having a local temple.

- Dedications, such as those for countries, temples, and Church buildings.
- Visits of members of the First Presidency and the Quorum of the Twelve Apostles and important meetings, such as area conferences or meetings with government leaders.
- Early Church initiatives in a country or region (humanitarian efforts, touring groups representing the Church, and so on), which have often been the forerunners of the Church being established in a given place.
- Large-scale geopolitical events and natural disasters that impact the Church in a country or region.
- Translations of core Church literature, such as the scriptures and temple ceremonies.
- Anniversary celebrations associated with the events listed in this section.
- Innovations in Church administration or practice implemented on a country or regional basis.
- Widely held public perceptions of the Church, its members, and its teachings.

## RECORD TYPE OR FORMAT

## INSTRUCTION

**Journals.** These are personal accounts of an individual's experiences. These may be handwritten, typed, or even dictated into a recording device. Journals may exist on paper or digitally. Examples include personal and missionary journals, daybooks, and blogs.

Acquire journals from Church members who have written substantially about their faith and Church experiences.

**Correspondence.** Correspondence is written communication sent to and received by another person or organization. Examples include letters, emails, postcards, telegrams, and online posts.

Acquire correspondence to or from targeted people listed earlier in this section when it contains content relating to the Church.

**Scrapbooks.** These are compilations of records, containing such things as photographs, letters, journal entries, and small mementos. Church members often create scrapbooks to document a historical place or a specific event, such as a temple trip or a mission.

Acquire scrapbooks documenting targeted people, places, events, and developments when it contains content relating to the Church.

**Personal and family histories.** Such records include narratives written, and sometimes published, by or about an individual or family.

Acquire personal and family histories, but not genealogical information, from targeted people.

Acquire all published histories written about any Church member that have an appreciable amount of Church-related content.

**Personal or family papers.** These are written records created, acquired, or received by an individual or group of individuals who are related. In addition to many of the record types described in this section, personal and family papers may also contain talks, reports, and genealogical information or records, such as family group sheets, pedigree charts, and so on.

Acquire personal and family papers from targeted people when they contain content relating to the Church. Following the principles outlined in the "Original Order and Arrangement" and "Provenance" sections, weed out, if possible, genealogical records and materials that are not Church related.

### Photographs and audiovisual materials.

Photographs and audio and visual records can help document important people, places, events, and developments. Examples include recorded interviews, sound recordings, negatives, slides, printed photographs, 8mm movies, videos, and digital files.

Acquire audio recordings, still images, and moving images relating to targeted people, places, events, and developments, but be selective. Do not acquire large collections without consulting your contact at the Church History Department. For example, before acquiring dozens of video recordings you would discuss with your contact at the Church History Department why you think all the video recordings are important.

Ensure that the content has broad historical significance to a large number of Church members. Ideally, the creator or the donor will filter out duplicate, similar, or blurred images and provide useful information about each image, tape, reel, or file. For examples of simple identification templates that can be used to record information such as locations, dates, and names, go to [history.lds.org/adviser](http://history.lds.org/adviser).

## Assessing Published Records

Published records are works produced for public distribution; therefore, the likelihood of acquiring a duplicate copy is much higher than with personal records. Generally, we want only one copy of a published record in the Church History Department’s collection, especially when we have permission to digitize it. To avoid collecting unnecessary copies, check the Church History Catalog (accessible at [churchhistorycatalog.lds.org](http://churchhistorycatalog.lds.org)) and

consult with your contact at the Church History Department before acquiring any published materials. In some cases, we may desire duplicate copies. For example, we may want a second copy of a certain published work for a Church history center. Therefore, it is important to consult with your Church History Department contact whenever you are considering acquiring published materials.

RECORD TYPE OR FORMAT	INSTRUCTION
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**Church-produced publications.** Church publications include scriptures; priesthood, Relief Society, Sunday School, and other manuals; Church magazines; hymnbooks; general conference audio or video recordings; publications about local units; mission-produced teaching curricula; mission newsletters; pamphlets; and so on.



Collect all Church-produced publications—whether published locally or at Church headquarters—that have not already been acquired by the Church History Department. Collect these records in all languages, printings, and editions. Ideally, publications produced by Church units or by Church departments will be donated free of charge.

Many Church publications are already in the Church History Department’s collection, and many of these records have been or will be digitized and made available online. Therefore, do not collect additional copies unless specifically instructed to do so by your contact at the Church History Department. Early scriptures, those published before 1930 and first and rare printings, are an approved exception. When possible, consult with your contact at the Church History Department whenever you have the opportunity to acquire early editions of the scriptures published by the Church.

The Church History Department captures content on all Church websites. However, if you discover historically significant content on non-Church websites, share the URL with your contact at the Church History Department. When possible, the department will harvest the information directly from the website.

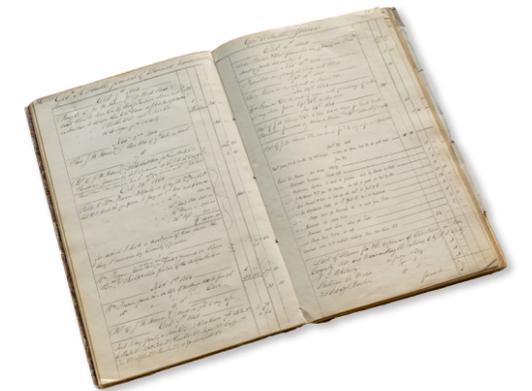
**Church-related publications.** These include works that have an appreciable amount of Church-related content and focus on the doctrine, history, and practical theology of the Church; programs adopted by the Church (such as the 12-step program or language training materials); and Church culture, whether these materials are positive or negative. These works may be published by any organization other than the Church or by any person other than the Church’s representatives. Examples include a news story about the Church’s response to a natural disaster, a scholarly article about Church schools, a Church history book published by a member, an anti-Latter-day Saint pamphlet, and a blog that speaks critically about Church leaders.

Acquire copies of all Church-related publications that have an appreciable amount of Church-related content. Collect all qualifying publications in all languages—whether they are faith promoting, positive, neutral, negative, or anti-Latter-day Saint—that have not already been acquired. The Church collects anti-Latter-day Saint literature based on Joseph Smith’s instructions: “Gather up the libelous publications that are afloat; and all that are in the magazines, and in the encyclopedias, and all the libelous histories that are published” (D&C 123:4–5).

Share the URL for any websites containing Church-related content with your contact at the Church History Department. When possible, the department will harvest the information directly from the website.

## Assessing Local Church Records

Local Church records include all records pertaining to the operations and management of a group, branch, ward, district, stake, or mission. Records belong to the Church if they were created as part of a person’s calling. However, this isn’t always understood and should never be made a point of dispute.



RECORD TYPE OR FORMAT	INSTRUCTION
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**Ward or stake annual histories.** Every Church unit is to compile a meaningful annual history and submit it to the Church History Department (see *Church History Guides: Stake, District, and Mission Annual Histories* for more information). Local Church units are also encouraged to maintain a copy of their annual histories.

Acquire all annual histories that are not already in the Church History Department’s collection.

**Photographs and audiovisual recordings.** These are photographs and recordings of local buildings, members, events, or meetings.

Acquire unique photographs of Church buildings. Acquire unique and significant photos of local leaders, member groups, and activities not documented in an annual history.

Acquire unique audio and video recordings of significant events and meetings.

Be selective and do not acquire material until you are confident it is historically significant.

**Minutes and operational records.** Minutes include notes taken during Church meetings, such as sacrament meeting, ward council, and priesthood executive committee meeting. Prior to 1978, each local Church unit was required to submit its minutes to the Church History Department. Since then, the submission of minutes to Church headquarters is no longer required, but the practice of keeping minutes is still encouraged.

Acquire all minutes and operational records created prior to 1978.

Operational records include membership records, tithing and financial records, activity reports, and ordinance records. Contemporary operational records are collected using Church computer programs and do not need to be acquired by you.

Instructions for handling contemporary records can be found in chapter 13, section 7, of Handbook 1: Stake Presidents and Bishops (2010). Do not acquire contemporary operational records without receiving permission from the Church History Department.

Notwithstanding these instructions, contact the Church History Department when you discover post-1978 minutes or operational records that you believe have historical significance.

**Newsletters.** Newsletters often contain messages from Church leaders, calendars, lists of birthdays, and announcements about Church members.

Acquire all newsletters that contain unique content about the members in a specific unit and that have not been, to the best of your knowledge, previously submitted to the Church History Department. Including newsletters in annual histories is common but very difficult to determine whether newsletters were submitted in past annual histories. Therefore, acquire all copies when in doubt.

**Meeting materials.** These include printed programs, agendas, handouts, posters, brochures or leaflets that advertise, describe, or celebrate a meeting or special event.

Acquire meeting materials associated with targeted events.

## Assessing Art and Artifacts

Church members may have art and artifacts that illustrate the broad and diverse history of The Church of Jesus Christ of Latter-day Saints, its culture, and its members. These items can serve as catalysts for telling stories and can help expand our knowledge about people, countries, events, and cultures (see D&C 93:53). However, collecting and preserving art and artifacts poses unique challenges. Therefore, these items are collected with more scrutiny compared to the other record categories, and the decision whether to acquire the item is made by a professional at the Church History Museum in Salt Lake City, Utah. Your role is to recommend items and to provide information that informs the acquisition decision.

Before making a recommendation, learn as much as possible about each item, including its provenance or history, creation date, artist's biographical information, dimensions, medium, subject matter, and why the item is important to the history of the Church. (See "Basic Concepts" in the appendix for more information about provenance.) Send an email and several photographs to your contact in the Church History Department explaining why you think it is important to acquire the item. For artifacts, include the story or stories associated with the artifact. Your contact will work with the Church History Museum staff to evaluate your recommendation. Do not make any commitments or decisions about acquiring art and artifacts without receiving authorization from the Church History Department.



Combining a story with an object can be powerful. For example, Joseph William Billy Johnson of Ghana owned this radio. He first heard about the Church in the early 1960s and was converted by reading the Book of Mormon. For many years, he prayed for the arrival of missionaries and organized several congregations of people who were also longing for baptism and Church membership. On the night of June 9, 1978, Johnson could not sleep. He arose from his bed and felt prompted to tune in to the world news report, during which he heard that the priesthood had been extended to all worthy male Church members. Soon after missionaries arrived in Ghana, he, and many members from his congregations, joined the Church. This is an important story with broad Church significance, and acquiring the radio can enhance the telling of the story.

RECORD TYPE OR FORMAT	INSTRUCTION
<p><b>Art.</b> This includes objects that were created primarily for display, such as paintings, sculptures, drawings, fiber works, photographs, batiques, mixed media, fine printmaking (etching, lithography, linocuts, woodcuts), or any other folk or fine art traditions.</p>	<p>Recommend art created by Latter-day Saints, for Latter-day Saints, and about Latter-day Saints that is well respected by members within your region.</p>
<p><b>Artifacts and remnants.</b> These are physical objects, both common and unique, that become significant when they are associated with a person, place, or event from Church history.</p> <p>Remnants are objects from Church sites or buildings. Examples of remnants include a decorative window frame from the first Church building in a city, a mural displayed in a Church building, or a meetinghouse sign.</p>	<p>Recommend artifacts and remnants that relate to general Church history stories and help tell the broad story of the Latter-day Saints. Broad topics such as temples, missionary work, Church welfare, and the geographical spread of the Church should be prioritized. Emphasize artifacts and remnants that have a high likelihood of being exhibited.</p>
<p><b>Latter-day Saint items.</b> These include clothing, jewelry, and other items created for Church members. Examples include sacrament trays and cloths, scripture covers, and clothing or trophies associated with a Church school.</p>	<p>Recommend items that represent Latter-day Saint experiences that are unique to your region.</p>

## Complete the Donation Agreement

Every donation you acquire for the Church should include a properly completed and signed donation agreement, whether you are acquiring the original record or digitizing and returning it. The donation agreement gives the Church legal rights to preserve and use the record. Without it, the records will be of limited value to the Church. Each section on the donation form is important and should be filled out completely while you are with the donor. Having the donor's input is essential, but other than the donor's signature, you should do the actual writing on the form to ensure it is orderly and legible. Much of the information you will gather on the donation agreement is required to create a good description in the Church History Catalog (available at [churchhistorycatalog.lds.org](http://churchhistorycatalog.lds.org)). For more information, see the video "The Importance of Cataloging" found on [history.lds.org/adviser](http://history.lds.org/adviser). A download link for the agreement and detailed instructions can be found on [history.lds.org/adviser](http://history.lds.org/adviser).

When the person donating a record is different than the creator of that record, understanding the donor's relationship to the creator and how he or she came to possess the record is vital in helping determine what intellectual rights are being granted to the Church. (See "Basic Concepts" in the appendix for more information.)

Records with different provenances (chain of custody) should never be combined on one donation agreement, even when the same person is donating them. Use separate donation agreements to distinguish between collections that have been created or authored by different people or organizations. Applying the principle of provenance explained in the appendix of this guide will help you determine if multiple donation agreements are needed. For example, imagine a donor offers a journal from his missionary service along with an autobiography written by his deceased grandmother. In this scenario, because each record has its own provenance, you would fill out (and the donor would sign) two donation agreements: one for the donor's missionary journal and another for his grandmother's autobiography.



Working with the donor, fill out every section of the donation agreement.

Collections from different donors should not be combined, even if they are about the same subjects, themes, events, or individuals. When records from one collection are intermingled with records from another collection, the integrity of both collections is compromised and their research value and historical reliability are diminished.

Sometimes a person has collected records created by a Church unit (branch, ward, district, stake, or mission), such as minutes and reports. Technically, these records belong to the Church, and it is not necessary to have the donor sign the donation agreement. However, if the donor feels that he or she owns the records, it may be easier to have him or her sign the donation agreement rather than debate ownership issues. Using the agreement also helps document how we obtained the records and the past chain

of ownership. Nevertheless, do not combine Church records with personal records on the same donation agreement, because they have different provenances. Use two donation agreement forms, and on the form used for the Church records, be sure to indicate how the donor came in possession of them.

You may have a donor who refuses to sign the standard donation agreement because of the legal language or you may feel the standard donation agreement doesn't apply to the situation you are handling, such as when we pay to acquire an item. Often acquiring art and artifacts will require alternative agreements. If you are unsure how to handle something or if obtaining a signed donation agreement is becoming overly complicated, seek clarification from your area Church history adviser or from your contact at the Church History Department.

## Create a Case File (Organize Your Paperwork)

Create a folder for storing the signed donation agreement, your notes, and other documentation related to the donation. This folder is called a case file. Each donation should have its own case file, which should be labeled with the donor's name. The case file will eventually be stored in the facility where the donated records are preserved.

Records acquired in hard copy should have a hardcopy case file, which will be delivered or shipped along with the physical records to a records preservation center or the Church History Department in Salt Lake City. When shipping or delivering donations, place the case file folder in the same shipping box or envelop as the records.

Records acquired in digital format should have a digital case file, which will be transmitted with the digital records to the Church History Department. You may need to scan or photograph the donation agreement, capturing both front and back and perhaps some of the other case file documents to create a comprehensive digital case file. The name of each document in the digital case file should include the donor's name and a brief description that communicates what the file contains, as shown below:

Santos, Marta\_agreement.pdf

Santos, Marta\_notes.docx

You may want to keep a duplicate copy of the case files you create for future reference, either in hard copy or digital format. If you do keep duplicate copies, store the files in a safe location, and when you are released from your calling as Church history specialist, these files, both digital and hard copy, should be sent to your area Church history adviser. Do not keep a copy of the files once you have verified the area Church history adviser received them.

# Delivering the Records

**Y**OU ARE RESPONSIBLE FOR DELIVERING OR shipping the records you collect to the Church History Department or to your local records preservation center as soon as possible. Church history specialists serving in the United States and Canada will deliver or ship their donations to the Church History Library (see address below). Specialists serving outside of the United States and Canada are to deliver or ship their donations to a records preservation center, as directed by the area Church history adviser. When borrowing records for digitization, you will also be responsible for returning the original records to the donor after they are digitized.



Keep records secure while awaiting delivery or shipment. Do not keep records in a place where other people can access them or where they might be damaged. When delivering records in person, do not leave them with someone who is not authorized and trained to receive Church history records. When returning original records to the donor, do not leave them with someone other than the donor, unless you have been instructed to do so by the donor.

## Handling Digital and Audiovisual Records

All digital and audiovisual records must be sent to the Church History Department in Salt Lake City, Utah, to ensure that they are preserved properly. For digital records, do not rename files and folders or try to impose an order on the original file structure; send the files without changing their original names and file structure.

Remember, you may request access to records stored in Salt Lake City through the Church History Catalog, found at [churchhistorycatalog.lds.org](http://churchhistorycatalog.lds.org).

Transmit digital records via an approved internet transfer method. If the files are too large to transmit, ship them using a reliable storage medium, such as a removable hard drive or USB flash drive. For audiovisual and digital records that require shipment, write the donor's name on the outside of the envelope, case, or container. Shipping multiple donations on the same transfer medium can often cause confusion, especially if the donations are not separated in different folders. Therefore, do not ship multiple donations on the same transfer medium without receiving specific direction from the Church History Department. If permission is granted, include a list of the donations stored on the medium.

(Left) Generally, each donation will be placed in its own shipping box to avoid mixing records from different donations.



Make sure the order and arrangement of the records is maintained when placing items in a shipping box.

## Prepare and Pack

Read the following instructions before packing records and objects for shipping. For more information, see the video “Packing and Shipping Objects” found on [history.lds.org/adviser](http://history.lds.org/adviser).

- Make sure the order and arrangement of each collection is maintained during shipment. If this is not possible, leave instructions for how to reestablish the proper arrangement when the shipment arrives.
- Do not combine multiple donations in a single box unless you have a sure method for keeping them separated during shipment (such as placing each donation in its own envelope); generally, each donation should have its own shipping box or boxes.
- Inspect records and objects to ensure that they will be safe in transit. If an item is too fragile to ship or too large to fit in a shipping container without being rolled or folded, consult with the Church History Department before shipping.

- Use shipping containers, packing materials, folders, envelopes, or similar materials to protect records and objects and keep them from moving during shipment.
- Label the shipping boxes with appropriate handling instructions, such as “Handle with care.”
- Consider the monetary value of records or objects, and make sure the package is appropriately insured. Consult with the Church History Department before shipping valuable records.



If needed, write appropriate handling instructions on the outside of the shipping box.

## Ship the Records

For shipments to a records preservation center, contact the area Church history adviser for shipping instructions.

For shipments to the Church History Department, use the following address:

Church History Department  
Acquisitions and Receiving Center  
15 East North Temple Street  
Salt Lake City, UT 84150-1600

Select a reputable company to ship records. Use the tracking system provided by the carrier, and keep a copy of all shipping documents in a safe place (such as with your copy of the case file). As soon as the shipment leaves, email or call the recipient (the storage facility, or the donor if you are returning the records after digitization) to alert him or her that the shipment is coming and to give the shipping information.

When approval has been given by the department prior to shipment, the Church History Department will cover the cost of shipping records.

Drastic differences in climate may affect the records. For instance, moving an object from a hot and humid climate to a cold and dry one may cause it to crack or split. When shipping to a different climate, be sure to inform the recipient that the records will require acclimatization procedures before they are unpacked. You should

also inform the recipient whenever the records you are shipping may introduce contaminants into the facility. For instance, if, after receiving permission from the Church History Department, you acquired some important records that you suspected were contaminated with insects, you would notify the records preservation center or Church History Department at the time you ship the records so they can take precautions when the shipment arrives.

# Appendix

## Basic Concepts

### Records and Collections

A record, in the broadest sense, is information in a fixed form that documents a person’s experiences or recounts the history of a given locality, Church unit, or event. Records can be physical items or digital files. Manuscripts, photographs, video recordings, published books, art, and artifacts are examples of different record types.

A collection is a group of records assembled by a person or organization, with some unifying characteristic, such as multiple records created by the same person or organization or records compiled about an event or topic. A collection may contain individual records created by different people or organizations as long as these records were compiled with a unifying purpose. Collections may be large or small and may have assorted record types. Examples of collections include the following:

- Several journal volumes authored by the same person
- Correspondence received by a person
- Photographs, manuscripts, and objects collected pertaining to a place
- Files, talks, photographs, and newsletters relating to a person’s Church service

For more information, see the e-learning course “Identifying Records and Collections” found on [history.lds.org/adviser](http://history.lds.org/adviser).

### Donations

Donating is the act of transferring to the Church physical ownership or the intellectual rights to a record or both the physical item and its intellectual rights. It is formalized by signing a legal agreement, most commonly the donation agreement. To download a donation agreement, go to [history.lds.org/adviser](http://history.lds.org/adviser). Without a properly signed donation agreement, the Church History

Department may be restrained in how it can use or provide access to the record.

### Ownership and Copyright Definitions

**Owner:** The person or organization that has legal custody of the record.

**Donor:** A person or organization that donates the record to the Church. Often owner and donor are used interchangeably and can refer to the same person or organization.

**Creator:** The person or organization that is responsible for producing, compiling, or forming a record. For example, a creator may be an author, photographer, painter, or sculptor. Creators typically hold intellectual rights, such as a copyright, that protect their interests. The donor and creator are not always the same person.

**Compiler:** The person or organization that is responsible for bringing a group of records together as a collection. Compilers may also hold the copyright when they have created some of the material themselves or added information, such as a preface or index, to the collection of records.

**Copyright:** Exclusive legal rights granted to a creator over his or her creation. Those rights extend for a certain period of time, generally for the creator’s lifetime plus 70 years. Copyright can be transferred, but it can be complicated to know with certainty who owns the rights when the creator is deceased. Therefore, unless you have specific information to the contrary, assume that the copyright of a deceased creator was passed down to all direct-line descendants and that any direct-line descendant is authorized to sign the donation agreement.

An owner or donor may or may not have the copyright for a record. For instance, a man may donate his personal journal and a purchased book. In both cases, he is the owner and donor, but only in the case of the journal is he the creator and therefore able to transfer the

copyright. Determining who owns the copyright can be complicated. You can help by thoroughly completing every field on the donation agreement. When you can, explain the relationship between the donor and the creator of the records on the donation agreement. Record any information the donor tells you regarding his or her rights, including statements about not having the copyright to the records.

For more information, see the e-learning course “Who Is the Owner, Donor, or Creator?” found on [history.lds.org/adviser](http://history.lds.org/adviser).

### Original Order and Arrangement

The principle of original order means that the order of the records that was established by the creator or compiler should be maintained whenever possible to preserve the existing relationships between the documents.

Part of the historical evidence in a collection may be found in its organization (how records are grouped together) and its arrangement (how the various groups relate to each other). When handling a collection, be sure to maintain the order and arrangement established by the creator. Normally, collections are arranged alphabetically, numerically, topically, chronologically, by record format, or some combination of these methods. It is uncommon for a collection to lack original order, but such order can be lost over time.

### Provenance

Provenance has two key meanings:

1. It is an understanding of the past ownership of a record or record collection. Understanding the chain of custody over time helps determine a record’s authenticity and ownership of the intellectual rights.
2. It is an understanding of why a record or collection of records was created or compiled and how it was organized, arranged, and used by the creator or compiler. “Maintaining the provenance” refers to preserving the record collection’s integrity and organization.

Never mix or combine donations with separate provenances or records received from different donors. Sometimes records with separate provenances are donated together. For instance, a person may offer his personal records as well as his deceased father’s records. Applying the principle of provenance would mean treating this offering as two separate donations because each collection has its own distinct provenance. In this example, the donor would sign two donation agreements: one for his records and one for his father’s records.

### Historical Significance and Collecting Scope

Under the direction of the Church Historian and Recorder, the Church History Department serves as the Church’s institutional archive, and its staff collects records of enduring historical value to document the history of the Church and select personal records of institutional significance. Many members of the Church create personal records that contain historically significant information. However, the department prioritizes collecting records that have broad historical significance to a large number of Church members over those that have narrow implication to a family or individual. Selecting the “important things” out of the many possible things involves wisdom, experience, discernment, and the direction of the Spirit (see D&C 57:13; 69:3, 7–8; Words of Mormon 1:5–6).

### Sacred, Private, or Confidential Information

Some records you collect may contain information that is inappropriate to release to the public because it is sacred, private, or confidential. Reporting this kind of information will help the Church History Department take appropriate precautions when providing future access to the records. Specifically, report any of the following to your contact at the Church History Department:

- Specific wording or details regarding a temple’s interior, temple rites or ceremonies, the temple garment, or other temple clothing

- Reports of confessions, Church disciplinary councils, or other personally sensitive matters shared in confidence with a Church leader
- Information shared or discussed in nonpublic Church settings (such as leadership meetings)
- Specific personal health information
- Financial information about individuals, including information about Church donations and welfare assistance
- Information whose release would violate applicable data privacy laws (for example, personal identification numbers, addresses, phone numbers, email addresses, full birth dates, criminal history, sexual history, or ethnic background)
- Information that may cause significant harm to the well-being or standing of people named in or related to the record, including stories about people who are still living and may not know they are discussed in the record
- Restrictions requested by the donor and documented in the donation agreement (preapproval from your contact in the Church History Department is required before agreeing to donor-imposed restrictions)

The Church History Department considers additional criteria when governing access to records. These criteria include intellectual property rights, physical characteristics, location of the records, and other legal and regulatory issues (such as defamation).

# Collecting Records Checklist

Under the direction of the Church Historian and Recorder, the Church History Department serves as the Church's institutional archive, and it oversees the collecting of historically significant records that document the history of the Church.

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## Key Principles

- Receive training and seek ongoing guidance from your contact in the Church History Department.
- Plan and implement collecting projects in partnership with the Church History Department.
- Prioritize collecting records that have Churchwide significance over records that have only family or personal significance.
- Obtain a properly signed donation agreement. Without it, the Church History Department may be restrained in how it can use or provide access to the records you collect.
- Maintain the original order and arrangement of the records you collect.
- Never mix or combine donations received from different donors or donations with separate provenances even if those records are donated together.
- Seek guidance from your contact in the Church History Department whenever in doubt on what to do.

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## Three Steps to Collecting Records



### 1. Preparing to Collect Records

- Learn local Church history to better recognize what records should be collected.
- Complete basic training for collecting records.



### 2. Collecting Records

- Work with the Church History Department to develop a focused collecting project.
- Meet with potential donors and take enough time to build their trust.
- Assess potential records carefully before agreeing to collect them to ensure that they meet collecting guidelines. Not all records should be acquired. Seek additional guidance when needed.
- Think digital first, but not digital only when collecting records.
- Fill out the donation agreement completely and have the record donor sign it.
- Place the physical copy of the signed donation agreement, your notes, and other documentation related to the donation in a case file.



### 3. Delivering the Records

- Send all digital and audiovisual records to the Church History Department in Salt Lake City, Utah, to ensure that they are preserved properly.
- Transmit digital records via an approved transfer method, when possible. Otherwise, deliver or ship digital records using a reliable storage medium, such as a hard drive or USB flash drive.
- Deliver or ship physical records to the Church History Department or to your local records preservation center as soon as possible. Deliver the records yourself or use a reputable shipping company. Prepare and pack records so they will be secure while in transit.





THE CHURCH OF  
**JESUS CHRIST**  
OF LATTER-DAY SAINTS