Donating personal archives to the Dalhousie University Archives: A guide for faculty members

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Related policies:	Libraries' Gift Policy

Background and purpose

The work of Dalhousie faculty forms an important part of the University's institutional memory, and their papers chronicle its teaching, service and research mission. Curriculum materials, research files, correspondence and administrative records document not only the development of the University, but also the progression of scholarly activity across a range of disciplines.

The University Archives has prepared the following guidelines to assist faculty in identifying personal archival material appropriate for donation. The guidelines organize personal archival material into the following categories:

- Biographical information
- Teaching
- Research
- University service
- Community service

Prospective donors should discuss the final selection of materials in consultation with an archivist. If you are transferring a large volume of records, the Archives staff will want to examine the records onsite before they are transferred to the Archives.

Donations are considered gifts to the University, and donors will be asked to sign a donation agreement that details the terms and conditions of the gift. The University typically asks donors to transfer intellectual property rights or grant a non-exclusive license to copy and distribute the material, but donors can always discuss intellectual property rights during the negotiation of a donation agreement.

Biographical information

Biographical information provides contextual information about the individual creator of the records as well as speaking to the life of the contemporary academic.

The Archives may be interested in the following types of documents:

- The most recent copy of your curriculum vitae and any diaries, memoirs, reminiscences or general biographical articles that describe you or your work;
- Annual reports;
- Correspondence that provides evidence of turning points in your career or documents important relationships with colleagues, students and others;
- Records pertaining to internal or external awards or significant community achievements.

The Archives is generally not interested in the following types of documents:

- Old curriculum vitae and updates, routine notices or correspondence regarding promotions or merit increases;
- Certificates, degrees, medals, and other awards.

Teaching

Records that document teaching can be used to illustrate the development of academic disciplines; exams and lecture notes can indicate teaching trends; other teaching records may also help to determine whether larger shifts in subject disciplines occurred concurrently or otherwise with trends in scholarly publishing.

The Archives may be interested in the following types of documents:

- Lecture notes that illustrate what you were teaching at a particular point in time;
- Representative exams (master copies with answers—*not* the exams of a particular student) and master copies of assignments or problem sets that illustrate what your students were expected to learn;
- Correspondence and other documentation about particularly notable graduate students, including student papers if very significant.

The Archives is generally not interested in the following types of documents:

- Rough lecture notes that served only as loose guidelines to your classroom presentations;
- Routine student documentation (requests for grade changes or other administrative measures, student papers, most letters of recommendation, enquiries about graduate school). Much of this is subject to privacy legislation and should be dealt with as part of the University records management program.

Research

Without detailed knowledge of your field, it is impossible for archivists to make a representative selection of your most significant research material. You can be of great assistance to us by choosing carefully what to donate.

- **Correspondence** that illustrates the research process, scholarly interaction, your personal development as a scholar, and the intellectual spirit of the times.

  Please include:
    - Correspondence that relates to your research areas, which may include responses to your publications or other discussions with professional colleagues.

  Do not include:
    - Routine correspondence including letters of transmittal, orders for books, requests for reprints, etc.

- **Publications** that illustrate the research process and the history of your discipline.

  Please include:
    - Files on your publications (books, monographs etc.) if they contain substantive correspondence with the editor or referees, correspondence with other scholars, drafts *if significantly different from the published version*;
    - One copy of any article published in a publication not readily available;
    - Publications by others that have highly significant informational value but may be very difficult to obtain through normal bibliographic channels.

Do not include:
- o Copies of articles (yours or others) found in standard published sources;
- o Books (yours or others) unless heavily annotated;
- o Reprints (yours or others), unless heavily annotated or form an integral part of a significant file (e.g., an article that led you into a particular research direction);
- o Drafts that are substantially the same as the finished publication;
- o Refereed reports on others' publications unless highly significant.

- **Research data** illustrates the research process and may promote additional research if the unexploited data can be used by other scholars. It may also be used by historians of your field.

  Please include:
  - o Data supporting your major research achievements;
  - o Highly significant research data that did not make it into publication (e.g., audio interviews for a project for which you used only a portion of the information) — data must be decipherable, intelligible to others, well-organized, and provided with a context;
  - o Field notes, lab manuals, data dictionaries, and other supplementary information that assist with the interpretation and curation of research data

  Do not include:
  - o General notes taken from reading literature in the field.

- **Grant applications** may offer a summary of a researcher's best work at a particular point in time and therefore be useful for tracing the history of academic disciplines.

  Please include:
  - o Selected grant applications that summarize your work at a particular point in time or represent notable awards for research that proved to be significant.

  Do not include:
  - o Blank forms;
  - o Multiple drafts of grant applications;
  - o Records documenting minor or routine grants;

o   Your adjudication of others' grant applications, unless highly significant.

- **Conferences** often create information not recorded elsewhere that documents your own research and the scholarly process.

  Please include:
  o   Unpublished speeches or presentations made by you. To provide context, it may be helpful to include a program from the conference or *substantive* correspondence relating to your presentation.

  o   Do not include: Administrative material related to your conference attendance (e.g., airplane tickets, hotel reservations, expense account documentation, etc.);
  o   Routine correspondence ("thank you for agreeing to speak").

- **Scholarly Organizations** may document your role as an academic; your work in national organizations can be of significance in illustrating the cooperative nature of the scholarly process.

  Please include:
  - Correspondence and other documentation if you played a significant historical role (e.g., determining a new policy or setting a new direction for the organization).

  Do not include:
  - Bulletins, newsletters and routine correspondence with professional and scholarly organizations. We have to assume that each organization is keeping its own collection of this type of archival material.

University service

University record keeping is imperfect, and your records may fill some gaps in ours. Your annotations and notes on significant committee materials or other university documents could shed an important dissenting opinion on the history of events.

The Archives may be interested in the following types of documents:

- Annual reports
- Agendas, minutes and supporting papers of significant committees for which you were chair and *de facto* record keeper *or* when you suspect that the documentation is not being maintained elsewhere;
- Heavily annotated copies of minutes or agendas of significant committee meetings for which you were not chair.

The Archives is generally not interested in the following types of documents:

- Widely disseminated general publications such as university calendars, newspapers or magazines (unless they form an integral part of a significant file, e.g., University Affairs published an article on a research interest of yours);
- Circulars and bulletins (announcing holiday closures, public lectures, power outages, senate elections, etc.);
- Board of Governors or Senate records; or Faculty or Departmental Council minutes and related records unless your copies are heavily annotated.

Community service

Community Service records that document the relationship between the university and the community as well as the relationship of your profession to society at large.

The Archives may be interested in the following types of documents:

- Correspondence and other records that demonstrate the relation between your scholarship and the community (e.g., letters to the editor or minutes from a community group that you chaired);
- Records that are tangential to your scholarship but represent important historical events or significant community concerns or issues in which you participated.

The Archives is generally not interested in the following types of documents:

- o Subject files (e.g., news clippings or magazine articles) that represent areas of interest rather than active participation.

Further information

- Research and teaching records encompass many different media, including photographs, drawings and audio-visual records; we accept and preserve these materials;

- For digital records, including email, please consult with the Archives regarding software, hardware, and electronic file format requirements.

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Document control

Version	Date	Author	Version Notes
Version 3	03 October 2022	Jennifer Lambert	This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License
Version 2	19 October 2017	Jennifer Lambert	Adds explanatory notes for collection rationale Borrows heavily from SFU's Guidelines for Donating Faculty Papers This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License
Version 1	December 2014	Jennifer Lambert	This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.

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