THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

# Collecting Records Seminar

This lesson and its associated learning resources can be used to prepare a three- to four-hour seminar about preparing, collecting, processing, and delivering records to an approved storage site. You may follow this lesson plan or create your own. The lesson plan uses all of the resources listed below. If you choose to create your own lesson plan, you may choose which resources to use.

## Objective

By the end of this seminar, participants should be able to demonstrate understanding of the following concepts: ownership, intellectual property rights, what is a record or a collection, and what constitutes sacred, private, or confidential information. They should also understand the four-step process for collecting records:

1. Prepare to collect.
2. Collect records according to established policies.
3. Process records that have been collected.
4. Deliver records to approved storage locations.

## Resources for Collecting Records

The resources listed below are available at lds.org/callings/church-history-adviser. On the home page, click **Training** and then **Collecting Records Guide**.

- *Church History Guides: Collecting Records*
- Collecting Records Seminar, with Lesson Plan
- Collecting Records Seminar PowerPoint
- Download All Collecting Records Training Materials for Offline Viewing (This resource contains all of the materials referred to in the lesson plan.)

## Teaching Suggestions

- Consider the background knowledge of seminar participants. Briefly discuss what they already know so you can adapt the lesson to fit their needs.
- Consider how much information they can receive in the time you have available and according to their level of understanding.
- Provide multiple opportunities for class members to interact. Participation helps them remember the content of the lesson. Several activities are included in the lesson plan. You may use them, adapt them, or create your own.
- Stop frequently to check for understanding. Give participants enough time to think, and then to answer. If appropriate, encourage participation by calling on individuals.

# Collecting Records: Lesson Plan

This lesson plan uses the materials found in the "Collecting Records" section of the Church History Adviser website: [lds.org/callings/church-history-adviser](lds.org/callings/church-history-adviser). The practice activities have both an online version and a print version. The print version was designed for classroom use. However, you may use whichever version you like when teaching.

You may choose to follow this lesson plan or adapt it to fit the needs of the group you will teach. The column on the right shows the PowerPoint slide that corresponds to that section of the lesson. Additional instructions for the teacher are shown in red. This lesson should take between three and four hours to complete, including breaks and answering questions.

### Materials Needed

For a copy of all materials, click **Download All Collecting Records Training Materials for Offline Viewing** at https://www.lds.org/callings/church-history-adviser/training/collecting-records-guide.

- Laptop computer with VGA cable, projector, screen, and speakers to plug in to the laptop computer.
- A copy of *Church History Guides: Collecting Records* for each participant.
- A copy of Things to NEVER do When Collecting Records for each participant.
- A copy of the donation agreement form, example, and the donation agreement instructions for each participant.
- A copy of the practice activity: Summarizing for each participant.
- A copy of the practice activity: Who Is the Owner, Donor, or Creator?
- A copy of the practice activity: Identifying Records and Collections (Identify Record Types and Identifying Record Types Cards).
- A copy of the practice activity: Evaluating Records Practice (Should These Records Be Acquired?)
- A copy of the practice activity: Unsolicited Donation Offers.
- Copies of some of the example cataloging worksheets.
- Several blank archive folders.

## Overview of Collecting Records (15 minutes)

If possible, invite participants to read the collecting records guide a few days before the seminar.

Before you begin, welcome the participants, and ask them to introduce themselves. Ensure that they are comfortable, and help them understand that they will be asked to learn, share their thoughts, and complete activities. Explain that the seminar will last approximately four hours, and that you will take breaks periodically. Ask participants to share a summary of what they may already know so you can adapt the lesson to fit their needs.

### Why Collect Records


Since the Church was organized in 1830, it has collected records from around the world, gathering and preserving information, testimonies, and memories that might otherwise be lost. Appropriately sharing this Church history helps bring people closer to Christ, strengthens their resolve to live the gospel, and provides them with patterns for overcoming adversity.

Ask participants how knowing their own family history, including conversion stories and testimonies, has helped them.

### Overview of Collecting Records

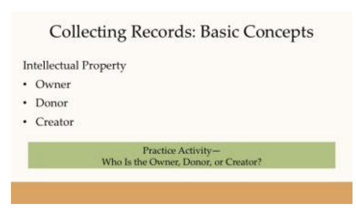

Read and discuss the overview page in the guide.

### Video—Collecting Records Summary


Discuss the video. Invite class members to share what they learned. Explain that the rest of the lesson will give more detail on each step of the collecting records process.

## Collecting Records: Basic Concepts (60 minutes)

### Ownership and Intellectual Property Rights




When you are collecting records, it is important to distinguish between the owner, donor, and creator of a record. This way the intellectual property rights can be properly documented and transferred to the Church.

### Practice Activity—Who Is the Owner, Donor, or Creator?

Read and discuss the definitions of owner, donor, and creator given in the guide. Then do the practice activity. Instructions for this activity and the activity pages are available in the print version.

### Definitions of Records and Collections

Historical records that the Church collects can be divided into four main categories. Knowing these categories will help you organize the records you collect. Using a common vocabulary will improve your ability to communicate with Church History Department staff and other Church history advisers.


### Practice Activity—Identifying Records and Collections

Read and discuss the definitions of collections and records given in the guide. Then do the practice activity. To complete this activity, be sure to print both items in the print version:

- Identifying Record Types
- Identifying Record Types Cards

### Sacred, Private, and Confidential


Some records may contain sacred, confidential, or private information that is inappropriate to release to the public. Such records, however, may still have historical value and are worth collecting and preserving. Identifying sacred, confidential, and private information when the record is acquired will allow appropriate precautions to be taken when providing access to future researchers.

Review and discuss the definitions of sacred, private, and confidential given in the guide. Have the class think of some examples of each.

## Step 1: Preparing to Collect (60 minutes)


### Video—Step 1: Prepare

Discuss the video. Invite class members to share what they learned. Answer questions and share insights. Explain that the guide gives more detail about this step in the collecting records process.

Generally, records are collected in accordance with the area Church history plan or in conjunction with a project initiated by the Church History Department. However, opportunities may arise that are not part of a plan or project. On such occasions, collecting may not follow all of the steps outlined in this section of the lesson, but the principles described below still apply.


### Learn History

Serving in a Church history capacity requires that you obtain a basic knowledge of both local and general Church history so you can more effectively appraise and acquire records.

Ask class members to identify and list significant people, places, and events in the history of the Church where they live. Invite class members to study this list as well as other relevant significant history over the next few months.

### Develop a Project

Collection projects provide focus and allow you to develop expertise with specific types of records or record creators. The more diverse the records you acquire, the more you will have to learn. Generally a collection project is initiated in partnership with the Church History Department.

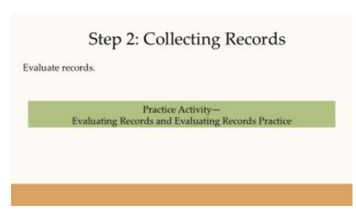
Read the examples of projects given in the guide. Have the class suggest possible additional projects. With each suggestion, discuss how it would need to be incorporated into the area Church history plan. Discuss how to prepare for projects.

## Step 2: Collecting Records


### Video—Step 2: Collect

Discuss the video. Invite class members to share what they learned. Answer questions and share insights. Explain that the guide gives more detail about this step in the collecting records process.

When you collect records, it is essential that you ensure that the record meets the guidelines in this section and that you have the donor sign the donation agreement.




### Evaluate Records

Acquiring records for the Church is an important responsibility because you are making a long-term commitment of Church resources. When deciding what to collect, use the general guidelines for collecting records found in the guide.

### Practice Activity—Evaluating Records and Evaluating Records Practice

Take time to review the information found in the guide, and discuss why it is important to be able to evaluate records correctly before they are collected. Then do the practice activity. Instructions for this activity and the activity pages are available in the print version of Evaluating Records Practice (Should These Records Be Acquired?).

### Sign the Donation Agreement


When you have determined which records should be acquired, discuss with the donor his or her willingness to donate the records. Always have the donor sign the donation agreement before you take the records, even when you are borrowing them to copy at another location.

Review the example donation agreement and the donation agreement instructions. Answer any questions.

## Video—Conducting a Respectful Donation Meeting

### Begin the Cataloging Worksheet


During your meeting with the donor, take a few notes that will help you when filling out a cataloging worksheet. You will complete the worksheet later, but having the record owner present will greatly improve the quality of the information you enter. It is best to ask about the following before parting company with the donor:

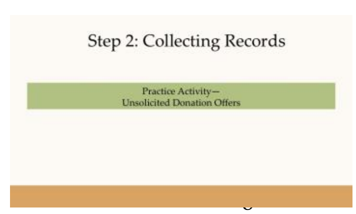
- Creator of the record
- Title and content summary
- Sacred, confidential, or private information (Explain the concepts of sacred, confidential, and private information, and ask if the record contains any such information.)

Review several example cataloging worksheets with the class. Answer any questions.

## Video—The Importance of Cataloging

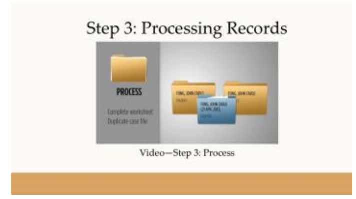
Discuss the video. Invite class members to share what they learned. Then do the practice activity. Instructions for this activity and the activity pages are available in the print version.

## Practice Activity—Unsolicited Donation Offers



Hand out, read, and discuss the document titled "Things to NEVER Do When Collecting Records."

## Step 3: Processing Records (60 minutes)

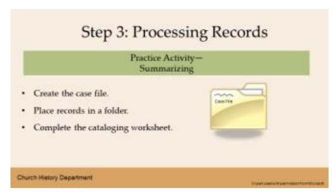



The step between acquiring a record and its long-term preservation is called "Processing." Processing begins at the time a record is acquired and is completed at the facility where the record will be preserved. (See "Step 4: Deliver.") It is best to complete the steps below within a few days of receiving the records. Processing one collection at a time will reduce confusion and allow you to incorporate feedback from the Church History Department into new collecting efforts.

### Video—Step 3: Process

Discuss the video. Invite class members to share what they learned. Answer questions and share insights. Explain that the guide gives more detail about this step in the collecting records process.

### Practice Activity—Summarizing



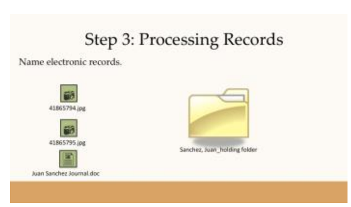

Do the practice activity. Instructions for this activity and the activity pages are available in the print version.

#### Create the Case File

A case file is necessary to store important documents related to the collection or record that was just collected. These documents include the signed donation agreement and the cataloging worksheet. The case file will be sent with the record and stored at the same location.

Have each member of the class practice creating a case file by writing the correct information from the example donation agreement on a blank archive folder.

#### Place Records in a Folder




To better protect the record or records, place them in an acid-free folder or, if necessary, in multiple folders. Additional instructions are given in the guide for records that will not fit in a folder. As much as possible, maintain the original order and sequence of the collection.

Discuss the similarities and differences between labeling these folders and the folder containing the case file. Also, take time to review the instructions in the guide relating to books, photographs, large items, art, and artifacts.

Review how to name electronic records. Emphasize that these instructions DO NOT pertain to the naming of digital files that are created by Church history advisers as they digitize records. Instructions for naming digital files are found on the Records Preservation Center Guide page of the Training section on lds.org/callings/church-history-adviser.

### Complete the Cataloging Worksheet

Using the cataloging worksheet, describe the records. Follow the instructions and example in the guide. Additional examples can be found on the Church history adviser website.

Take time to explore the similarities and differences between several of the example cataloging worksheets from the website.

## Step 4: Delivering Records (5 minutes)

### Video—Step 4: Deliver


Discuss the video. Invite class members to share what they learned. Answer questions and share insights. Explain that the guide gives more detail about this step in the collecting records process.

All acquired records should be delivered to an approved storage facility as soon as possible. The following should always be included in the shipment:

1. The actual record or records.
2. The case file containing the donation agreement, the cataloging worksheet, and any other documents related to the acquisition.

### Prepare, Pack, and Transfer Records

Review the information in the guide pertaining to these topics. Answer any questions.

## Conclusion

Take time to review the major portions of this lesson, and invite the class to ask questions if necessary. Invite class members to visit the website when they get home and review the materials found in the “Collecting Records” section of the website. This page on the website contains the learning resources that individuals can review and use to practice the content of this lesson.