

Deed of Gift Checklist

Please check off and initial each step as it is completed.

A. Preliminary Action

- _____ Ensure the donor completed and signed the **entire** *Deed of Gift*.
- _____ Record the donor number.
 - If this is a person who has already made a donation:
 - Record current year followed by donor number on the *Deed of Gift*.
 - If this is a first-time donor:
 - Assign the next available number from the donor binder.
 - Enter new donor name and number in the binder.
 - Record current year followed by donor number on the *Deed of Gift*.
- _____ Attach a photocopy of completed *Deed of Gift* top page to the donation.
- _____ Place the donation on 2nd floor assigned area.

B. Accessioning

- _____ Enter a donation summary into Past Perfect.
 - Donor number with current year
 - Brief description of donation
- _____ File the original *Deed of Gift* in the Donation Binder by donor number.
- _____ Send a thank-you letter to the donor. Date sent: _____
Note: If the *Deed of Gift* has not been signed by the donor, make a copy and include it with the thank-you letter.
- _____ Record the donation on the *Newsletter Donation List*. Newsletter issue: _____

C. Cataloging

- _____ Curator makes any necessary remediation to item and adds assigned donation number to item
- _____ Appropriate catalog sheet is filled out on item
- _____ Assign the next available item number (from Past Perfect) for the donor in the current year.
Note: A separate item number is assigned to each item of the donation collection.
Note: Item numbers begin with #1 at the beginning of each year.
- _____ Photograph each donation item.
- _____ Enter detailed item information into Past Perfect.
 - Photograph
 - Detailed description/search terms/people/notes/condition
 - Identifying number (current year – donor number – item number)

D. Storage

- _____ Store donation item(s)
 - Store item in archival materials as much as possible.
 - Store item in similar approved categories as determined.
- _____ File catalog sheet by assigned year/donor/item number.
Note: Each donor's catalog sheets are grouped together for that year.
Each year's catalog sheets for all donors for that year are grouped together.
January begins a new year.