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Death, dying and archives: learning to work with grieving and dying donors

Megan Garbett-Styger
Western Washington University

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**DEATH, DYING, AND ARCHIVES:
LEARNING TO WORK WITH GRIEVING AND DYING DONORS**

By

Megan Garbett-Styger

Accepted in Partial Completion
Of the Requirements for the Degree
Master of Arts

Kathleen L. Kitto, Dean of the Graduate School

ADVISORY COMMITTEE

Chair, Dr. Randall Jimerson

Tony Kurtz

Ruth Steele

MASTER'S THESIS

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Megan Garbett-Styger
November 26, 2014

**DEATH, DYING, AND ARCHIVES:
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A Thesis
Presented to
The Faculty of
Western Washington University

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Of the Requirements for the Degree
Master of Arts

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Megan Garbett-Styger
November 2014

Abstract

Archivists in collecting repositories deal with donors on a regular basis. Establishing relationships with potential collection donors is a fundamental part of an archivist's job. Often, archivists are faced with situations in which they are dealing with grieving and dying donors. Unfortunately, donor relations is an often ignored aspect in archival education. This thesis will explore archivists' relationships with grieving and dying donors and how these difficult situations are navigated on a personal and professional level. It will also provide suggestions for incorporating donor relations into graduate education.

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Introduction

“It may be that life is short, as with a moth, or long, as with a Sequoia; but the quality of being alive has implicit in it the quality of dying and knowing death.” ~Edgar N. Jackson

Donor relations is a topic often glossed over or ignored completely in archival literature and education. This is unfortunate as donors are highly important to the success of a repository. As authors Marisol Ramos and Alma C. Ortega state “Of all of your stakeholders, donors are the lifeblood of the archives and they are worth cultivating before, during and after they have donated materials.”¹ Building a relationship with donors is essential to gaining trust and working smoothly through the process of transferring collections to the institution.

My interest in donor relations and specifically working with those who are bereaved or dying began during my required summer internship for the graduate program at Western Washington University. I accompanied my internship adviser on a donor visit to the residence of a donor, who was a prominent member in the community, with early-onset Alzheimer’s disease. The donor was in a care facility and (with approval of the individual with power of attorney) we were meeting the donor’s close friend to go through records that would potentially be donated to our institution. As we were going through the donor’s records, his friend told us stories about him and his prominent role in the community. Although this donor had not passed away, it was fairly obvious that the friend was grieving a loss. Her friend no longer recognized her, and in many ways was gone. This made going through the records stressful for her as she worried about what would be done with the

¹ Marisol Ramos and Alma C. Ortega, *Building a Successful Archival Programme: A Practical Approach* Oxford: Chados Publishing, 2006) 48

records, struggled with watching her friend's life's work being picked through and carted off, and tried to make sure that we had the donor's best interests at heart and that his legacy would be well-represented in our collection.

After that experience, I started wondering how archivists handle situations where family and friends are grieving a loss while trying to go through records with the archivist, or how dying donors handle giving away their possessions. This was something that had not been covered in graduate school and was something I felt was important to talk about, especially because many of the donors archivists work with are elderly. At some point in his or her career, an archivist will be faced with grief and loss. Grief is something that affects everyone at some point in their lives and I felt it was important to discuss how archivists handle their emotions while working closely with bereaved or dying donors and also how to work with donors and their emotions while going through the grieving process. Donors are the livelihood of a collecting repository archives and knowing how to interact with and empathize with donors during various situations is important for establishing a trusting relationship between the donor and the institution. Collecting repositories deal frequently with donors as archivists solicit the community for collections. While institutional archives get records from the institution they support and do not typically deal with donors, they may also deal with certain types of "grief." They may work with faculty members who have lost jobs or are retiring, or have to clear the records from the office of a recently deceased employee with the help of a grieving family member. These situations may involve working with someone who is emotional or grieving. It is important for all archivists to have some sort of knowledge of donor relations and working with the grieving and dying.

During a graduate school class I began combing through the literature attempting to discover what archivists have said about working with the grieving and dying. I found that the literature was sparse, especially literature dealing with grieving and dying. Linda Long and Geoff Wexler's article was the best article that captured my own concerns and questions, and unfortunately there were very few others that tackled this question at all. I felt that this topic needed further exploration.

This thesis explores, through personal interviews with professional archivists, how archivists interact with grieving and dying donors on both a personal and professional level. The thesis presents anecdotes and advice regarding how to approach the dying and bereaved about donating collections, how to manage grief reactions such as anger and frustration, how to maintain a balance between personal feelings and professionalism, and how to best incorporate donor relations into graduate education. This thesis argues that archivists should have a better understanding of grief and the grieving process because archivists so often work with the grieving and dying. It also argues that donor relations is a topic that needs to be taken seriously in archival literature and during graduate level education. The first chapter presents a literature review that covers many topics involved in donor relations including legal issues, establishing trusting relationships, grieving and dying, and maintaining legacies. The second chapter provides an overview of major developments in grief research, mainly focusing on the groundbreaking research of Elisabeth Kübler-Ross afterwards, up to the digital age of grief experienced in the online environment. The third chapter presents and evaluates information gathered from ten personal interviews with archivists concerning working with grieving and dying donors and archival education in donor relations. The

conclusion will provide final thoughts on the topic as well as recommendations for how to implement donor relations into archival education.

Chapter 1

The Importance of Donor Relations

Donors are the lifeblood of collecting archives and many archivists deal with donors on a daily basis. Many of those donors are elderly or are family members who are grieving the recent loss of a family member whose collection will be transferred to the archives. Even archivists in institutional repositories may run into situations where they deal with retiring staff grieving the loss of their job or collecting documents of employees who have passed away. It seems that archivists go into the field with little knowledge of these situations.¹ Donor relations should be discussed *before* archivists are thrown into the field. This chapter will provide a literature review of the types of donor relations issues discussed in the archival literature, with particular emphasis on Linda Long and Geoff Wexler's article regarding grieving and dying donors. This is an especially important topic as it is one that seems to be avoided most in archival literature but is faced often in actual archival work.

The Importance of Donors and Contemporary Donor Relations

Relationships established with donors are like marriage. "It is a lifetime commitment and you are not only 'marrying' your donor but you are also inheriting his or her family."² Especially with donors of contemporary collections, the relationship may be a lifetime commitment. As Barbara J. Kaiser states, "one of the prevalent features of 20th-century collecting is the continuing relationship that usually evolves between the donor and the collecting agency."³ Contemporary donors may start giving early in their lifetimes, well

¹ Based on interview discussions with professional archivists.

² *Ibid*, 47

³ Barbara J. Kaiser "Problems With Donors of Contemporary Collections" *The American Archivist*, Vol. 32, No. 2 (1969): 103-107

before they are close to retirement or passing on. For the archivist, this means that relationships will have to be developed and maintained throughout the rest of the donor's life as well as after death with the donor's family and friends. From time to time, donors may need to access the collections they have previously donated for research so the archivist may have to provide reference services and research assistance as well as maintaining a trusting relationship that will help the donor feel comfortable donating future collections.⁴

Donors are not only important to building and maintaining archival collections, but they are also an archivist's link to the public and other potential donors. A bad relationship will result in negative publicity for the archives and a good relationship may bring more people in. According to Ramos and Ortega, "They can spread a good (or bad) word about you and your archives and attract other donors with related materials that can potentially enrich your holdings."⁵ Archivist Linda Long's close relationship with her donor, Tee Corinne, resulted in both of them working together to get many of the Southern Oregon Lesbian Community collections to be transferred to the University of Oregon Special Collections and University Archives. Tee was also able to convince many of her friends to donate their collections to the repository. This was possible because of the trust and respect in her relationship with the archivist.⁶ Relationships built on trust and professionalism will help both archivist and donor navigate the murky waters of legal issues, access, and emotional issues that go along with transferring and maintaining collections. Ramos and

⁴ Ibid, 107

⁵ Ramos and Ortega, "Building a Successful Archival Programme" 48

⁶ Geoff Wexler and Linda Long, "Lifetimes and Legacies: Mortality, Immortality, and the Needs of Aging and Dying Donors" *The American Archivist*, Vol. 72 (2009): 478-495, pg. 488

Ortega believe that “building high-quality relationships with your donors establishes a sense of respect and cooperation that can last for decades.”⁷

This type of relationship can aid archivists in avoiding miscommunication and misunderstanding in their relationships with donors. It can also make donors feel more comfortable with donating and opening collections to research that may be personal, emotional, or sometimes embarrassing. If donors do not feel that they can trust the archivist or the institution with their personal materials, they may try to weed out parts of their collections that they do not feel comfortable with.⁸ Archivists have to work with donors in order to create an access policy that makes the donor feel at ease and that the archivist feels is ethically sound. Creating satisfying legal agreements and access policies with donors is an essential building block of the donor-archivist relationship.

Issues of Legality and Access

Access policies and legal agreements can make or break a relationship between archival institution and donor. Clear legal agreements and access policies that are agreeable and ethical can lead to a fairly painless relationship between the archives and the donor. Legal agreements that are confusing or unclear and access policies that do not give the donor enough privacy or are unethical to researchers can lead to confusion, anger, and a generally strained relationship. Archivists should make sure that their donors are mentally capable of making decisions and that deeds of gift are clear and reasonable. Archivist Trudy Huskamp Peterson states, “This does not mean that the archivist must hire a private detective to investigate prospective donors; but it does mean that some tactful questions should be asked

⁷ Ibid, 48

⁸ Barbara J. Kaiser, “Problems with Donors” 104

early in the negotiating process.”⁹ Starting to build a relationship long before transfer takes place will establish the necessary trust on both sides, and give the archivist and donor time to negotiate a deed of gift and an access policy that is satisfactory for both parties. If this information is not worked out at the start, it could lead to long, drawn out legal difficulties that both parties will have to deal with well after the records have been transferred.¹⁰

It is essential to a good relationship to craft a deed of gift that both parties can agree upon and then for the archivist to honor it after the records have been transferred. Peterson states that “while developing a deed of gift, it is useful to remember that it is a contract in which both parties promise certain things: the donor to give, the archives to respect the conditions stipulated by the donor in the deed.”¹¹ It is a balancing act that archivists must perform to get the best results possible from the donor and the institution. One hurdle for archivists to overcome in donor relations is establishing legal ownership and copyright of the records before they are transferred in order avoid future problems and potentially angry donors.

One way to avoid a sour relationship between a repository and donors is having a conversation about the deed of gift and making sure the legal owner and holder of copyright is clearly understandable before the donation takes place. Sara S. Hodson highlights the problems associated with questionable legal ownership and access rights in her discussion of the Huntington Library and its collection of Dead Sea Scrolls negatives. The Dead Sea Scrolls were originally found in the country of Jordan but were subsequently transferred to Israeli authority when Israel took over the country. A group of scholars were responsible for translating and editing the documents under Israeli watch. Elizabeth Bechtel got permission

⁹ Trudy Huskamp Peterson, “The Gift and the Deed” *The American Archivist* Vol. 43, No. 1 (1979): 61-66, pg. 61

¹⁰ Peterson, “The Gift and the Deed” 62

¹¹ *Ibid*, 65

from the scholars and hired a photographer to photograph the originals. She gifted the master copy to the Huntington Library. Years later, the Huntington decided to open the negatives to research.¹² Predictably, this decision caused uproar. The Israelis and scholars in charge of editing believed that the library did not have the legal right to open the collection to the public. The agreement that Bechtel made in order to photograph the scrolls did not allow them to be opened for research.¹³ In fact, the scholars did not think the library had the right to hold the negatives at all. According to Hodson, “a major factor in the cartel’s objections centered around the question of whether the Huntington had the legal right to open the scrolls or even the right to hold a set of negatives.”¹⁴ When an institution takes in a donation, they should make sure they have the right to open the collection and that they have ownership of the collection in the first place. If the archives establishes an effective relationship with the donors before any transfers take place, incidents like the one at the Huntington are more likely to be avoided. In the Huntington case, it was unclear if Bechtel signed an agreement when she took the photographs, and the answer to who actually legally owned the Scrolls-- Jordan, Israel, the editors, the public-- was murky at best.¹⁵ Because it was unknown if Bechtel signed an agreement to restrict access to the scrolls and because the scrolls were in a war torn area being controlled by a select few, the Huntington felt that the ethical choice was to open the Scrolls to public access.¹⁶ It is hard to say here whether the Huntington made the ethical choice. Sorting through the tangle of who pillaged, owned, or signed what was enough to give the Huntington the wiggle room they needed for public support. However,

¹² Sara S. Hodson, “Freeing the Dead Sea Scrolls: A Question of Access” *American Archivist*, Vol. 56 (1993): 690-703, pgs. 690-693

¹³ *Ibid*, 695

¹⁴ *Ibid*, 695

¹⁵ *Ibid*, 698

¹⁶ *Ibid*

opening collections against the wishes of the person or persons who hold editorial rights is typically seen as unethical. This case is complicated though in that the Dead Sea Scrolls are so important to the academic community and the understanding of biblical literature and culture, and squirreling them away to be studied by a select few does not seem ethical either. It would be like Egypt closing off the pyramids or the U.K. banning access to Stonehenge. Closing off access to the scrolls denies them the differing perspectives and interpretations that allow for progress. In this case, the Huntington made the right decision.

In the case study of the deaccessioning program at the American Heritage Center at the University of Wyoming, Laura Uglean Jackson and D. Claudia Thompson found that the archivists ran into problems over legal issues of ownership. The American Heritage Center decided to begin a deaccessioning program in order to deal with a burgeoning backlog that was threatening to overtake the repository. The archivists soon discovered that relationships with previous donors had not been established or maintained and that many of the donations did not come with a deed of gift that established ownership. This meant that the archivists had to spend time tracking down owners or heirs in order to determine whether or not they could deaccession the collections.¹⁷ They also found that much of the backlog had materials that did not even fit the collection policy. The archivists had to go back and begin to establish relationships with donors that had given material several years before, and some of these were no longer alive.

Of course many of the donors or heirs were upset about having their collections deaccessioned. Though once the archivists sat down and had a conversation about their collection policy and reassured the donors that their collections would be transferred to better

¹⁷ Laura Uglean Jackson and D. Claudia Thompson, "But You Promised: A Case Study of Deaccessioning at the American Heritage Center, University of Wyoming" *The American Archivist*, Vol. 73 (2010): 669-685, 670-673

homes or given back to them, most of the donors were in agreement with the repository's decision. The authors state that "donor reaction ranged from enthusiasm to disappointment. A few donors, or their heirs, were eager to have the materials returned or transferred to a different repository. Some even assisted in the search for new and more appropriate homes. Only three donors expressed real anger."¹⁸ Thankfully in this case the archivists were able to establish relationships that led to a good outcome for most of the donors in the end. Uglean and Thompson state that "explaining our project has been a key factor in maintaining cordial relationships."¹⁹ Spending a little bit of time to communicate and build trust with donors can go a long way in creating the best possible outcomes for all involved. If the previous archivists had done this, the repository could have avoided these complications and could possibly have avoided the giant backlog of records in the first place. It is highly important to establish a legal agreement that is satisfying to both the archives and the donor when transferring records. It is also important when discussing issues of access with the donor.

The 2005 Society of American Archivists Code of Ethics states that archivists "discourage unreasonable restrictions on access or use' and 'observe faithfully all agreements made at the time of transfer or acquisition."²⁰ As archivists are building relationships with their donors, they need to discuss access restrictions and make sure that the restrictions are not unethical but also protect the donor and records creators from possible hurtful or embarrassing information being made public. Building trust is a key ingredient in assuring collections will be transferred to the repository and that they will be opened for public use when the time is right. Judith Schwartz states that "by constructing policies that

¹⁸ Ibid, 680

¹⁹ Ibid

²⁰ Randall C. Jimerson, "Ethical Concerns for Archivists" *The Public Historian*, Vol. 28, No. 1 (2006): 87-92, pg. 88. This quotation is from an earlier version of the SAA Code of Ethics. The current Code does not address this concern.

protect privacy, archivists can encourage donors to save and give revealing materials.”²¹

Balancing donor privacy with user access is “one of the most difficult balancing acts that archivists perform in carrying out their professional duties.”²² If a relationship of trust and an assurance of privacy are not established, this can lead to problems for the archivist and the collection.

It is common for donors and records creators to want to protect a family name, hide embarrassing or harmful information, and maintain privacy. If donors do not feel that their privacy is being protected or do not trust the repository to protect their sensitive information, they may take it upon themselves to weed materials that have historical relevance.²³ To prevent the destruction of valuable records, it is essential for the archivist to sit down and work out an access policy that is ethical and protects the privacy of the donor. Peterson states that “some donors want to review and approve or have a designee review and approve materials selected by the archivist for opening; this is cumbersome but workable as long as it is understood that all materials will eventually be open.”²⁴ The archivist must also make sure that access restrictions do not get in the way of normal processing and preservation. This should be stated in the deed of gift and agreed upon by the donor or heirs in order to avoid future legal issues.²⁵ Peterson believes that both sides “should strive for statements of restriction that are clear and unambiguous.”²⁶ A clear statement of the access restrictions to be put in place and a determination of when the restricted documents will be opened will avoid confusion, anger, and legal tangles in the future.

²¹ Judith Schwartz, “The Archivist’s Balancing Act: Helping Researchers While Protecting Individual Privacy” *The Journal of American History*, Vol. 79, No. 1 (1992): 179-189, pg. 180

²² *Ibid*, 179

²³ Kaiser, “Problems with Donors” 104

²⁴ Peterson, “The Gift and the Deed” 64

²⁵ *Ibid*, 64

²⁶ *Ibid*, 64

Randall Jimerson cites the case of Supreme Court justice Thurgood Marshall's papers to demonstrate the complications and ethical dilemmas that can arise with donors and heirs. Marshall's papers were going to be made public, as he had requested, but his family and friends wanted them limited only to scholarly researchers.²⁷ It was finally determined, through use of the SAA Code of Ethics, that Thurgood Marshall's papers would be open to access as he had stated. Jimerson declares that "archivists must secure clear legal authority to administer materials donated or transferred to the archives or manuscripts repository, whether from an individual or corporate donor. They must also adhere to the wishes of donors regarding access or restrictions on access to materials."²⁸

While access restrictions are many times necessary, Sara Hodson feels that archivists should only reluctantly accept restrictions on access and Elena S. Danielson warns of the "importance of steering donors away from draconian restrictions."²⁹ Unreasonable access restrictions can lead to ethical questions of user access and can create a mess for both the repository and the donor. Establishing a respectful and trusting relationship with the donor before, during, and after the transfer of documents can lead to donors being more comfortable allowing materials to be open and to less confusion and arguments later on. Archivists' relationships with donors do not only involve conversations about legal rights and access. Archivists may also find themselves dealing with death, grief, and materials that bring up sensitive issues for donors and heirs.

The Archivist as Counselor, Friend and Protector

²⁷ Jimerson "Ethical Concerns" 87-88

²⁸ Ibid, 89

²⁹ Elena S. Danielson, *The Ethical Archivist* (Chicago: Society of American Archivists, 2010) 34; Hodson, "Freeing the Dead Sea Scrolls," 701

For many archivists, the relationships established with donors can go beyond the professional into personal relationships or even friendships. Donors are human beings, and therefore the archivist will necessarily have to deal with sensitive issues relating to a person's documents. Archivists will inevitably have to face death and dying during their career. Many donors are dying or grieving the loss of a loved one whose papers will be transferred to the archives. These sorts of relationships are often and unfortunately ignored in archival literature. Geoff Wexler states that "most of the literature focuses on the technicalities of donor relations, such as legal precautions, accurate recordkeeping, and appraisal of the materials on-site."³⁰ This leaves archivists wholly unprepared for the inevitability of facing dying or grieving donors.

Wexler believes that "an understanding of aging, death, and survivorship is important to archivists when working with the elderly, the terminally ill and those who survive them."³¹ Archivists must be aware of the stages of grief that accompany dying and the grief of those left behind. Elderly donors may establish personal bonds with the archivist as a way to stay connected with the outside world. Wexler adds that "as aging in an urban society is increasingly an isolating process, archivists and other professionals may often be called upon to serve as vital connections to an outside world."³² Many may be angry, bargaining, in denial, or depressed, and it is likely that these feelings could be taken out on or vented on the archivist.

Archivists may also be drawn into long term friendships with donors and family members. Linda Long reminds archivists that "forming friendships with dying donors is not

³⁰ Wexler and Long "Lifetimes and Legacies" 479

³¹ Ibid, 480

³² Ibid 485

for the faint of heart.”³³ It takes an emotional toll on the archivist and he or she must be prepared to face the death of not only a donor, but a friend, when it does occur. They also have to be able to maintain a sense of professionalism and purpose. Archivists have a responsibility to the donors and their loved ones to preserve their legacy. Wexler states that “archivists have a responsibility to all of these people--perhaps even a sacred responsibility, to preserve the records that remain.”³⁴ He believes that a caring approach to dying donors, grieving heirs and friends, “can only enhance an archivist’s sense of professional responsibility.”³⁵ Archivists need to be available to help donors, whether dying or those left behind to make transferring personal papers and smooth and painless as possible. The archivist may support donors and grieving loved ones in the processes of healing and acceptance by making sure legacies are protected and honored under their care.

Archivist Linda Long from the University of Oregon illustrates the relationships archivists can build with donors and the responsibilities and consequences they face. Linda Long worked with artist Tee Corinne, an inspirational lesbian activist, to acquire her papers for the U of O collections. They built a relationship over several years as they discussed what Tee would donate and how she wanted her legacy to be represented. Tee knew that her papers were important to the lesbian community. Later, Tee was diagnosed with cancer and did not have long to live. Long was suddenly faced with finalizing the transfer of records of a dying donor. Not only did Long have to help Tee get her affairs in order in regard to her document transfer, she also had to mourn the loss of a friend.³⁶

³³ Ibid, 493

³⁴ Ibid, 478

³⁵ Ibid, 485

³⁶ Ibid, 487-489

Long stated that she was not sure how to handle this sudden change in their relationship.³⁷ How does one broach the subject of death? It is awkward, especially if the archivist does not know the person well. However it is an important step in helping the donor realize what they want their legacy to be and how it should be preserved in the archives. Long admits, “I had not realized that the archivist or manuscripts librarian plays a major role when a donor is dying, and now I understand that I could have been much more open and forward with Tee. The experience taught me that the archivist is the keeper of someone’s life, as the collector and manager of that person’s papers.”³⁸ It is unfortunate that archivists are not trained to handle these situations before they find themselves in the middle of them. Death and dying are hard enough subjects to deal with. Archivists should not be left to flounder about awkwardly in these situations. Some training should be provided, especially as archivists are almost guaranteed to work with a dying donor or grieving family at some point in their careers.

Tee ended up leaving her entire estate to the University of Oregon archives and special collections. She also was active in convincing other women in the lesbian community to start donating their papers as well. Long believes that trust was one of the main factors in Tee making this decision. She states, “I believe trust was core to Tee’s desire to leave her entire estate to Special Collections and University Archives.”³⁹ Although it was painful for the archivist, especially as she dealt with Tee’s death and grieving friends and family members, this relationship of trust was well worth the effort. Without it, the Special Collections and University Archives collection on the lesbian community would most likely

³⁷ Ibid, 488

³⁸ Ibid, 489

³⁹ Ibid, 488

be significantly lacking. Archivists not only deal with the hardships of death and dying, they also have to deal with collections that may be emotional, painful or dangerous to the donors.

Donors may be faced with transferring documents that bring back emotional memories or records that could be harmful to them if they got into the wrong hands. Archivists need to build trusting, caring relationships with these donors to ensure that they are confident giving their materials to the archives. Michael E. Stevens explores how archivists can deal with these sorts of situations in his report on the Voices from Vietnam Project at the State Historical Society of Wisconsin. The historical society decided to create a book on the Vietnam War made up of donors' documents. The society also took advantage of the project to collect donations for the repository. The relationships that the archivists built with the donors to the project led some of them to give their collections permanently. Stevens said that some were concerned about how their documents would be used in the book.⁴⁰ They were assured that their documents would be used with the utmost respect. Stevens believes that "the good will engendered by the society's relations with the initial donors served as the project's most valuable tool."⁴¹ Veterans who read the book and heard of the initial donors' experiences began to donate their collections as well.

Because the Vietnam War brought back painful memories for some veterans and their families, the archivists had to establish trust with them and also be willing to listen to their stories as they relived some of their experiences. One of the problems archivists faced was the donors' attachment to their collections. Stevens argues that "because the Vietnam War was relatively recent, letters, diaries, and photographs still had strong sentimental value to the

⁴⁰ Michael E. Stevens, "Voices from Vietnam: Building a Collection from a Controversial War" *The American Archivist*, Vol. 64 (2001): 115-120, pg. 117

⁴¹ *Ibid*, 118)

families of veterans, who were reluctant to part with their mementos.”⁴² The archivists were able to show sympathy to their situation and helped to reassure the donors that their stories would be presented in a respectful manner and that their stories were an important part of history.

The process was painful for many veterans as they “had not talked about the war since they returned home several decades earlier, and the process of bringing in and reviewing letters unleashed a torrent of pent-up and painful emotions.”⁴³ The archivists at the repository took the time to listen and converse with the donors throughout this process and reassure them that their records were in good hands. The donors learned to trust the archivists and many felt positively about handing over their collections.⁴⁴

Author Judith Schwartz realized the importance of donor relations when dealing with donors at the Lesbian Historical Archives. The donors realized that their records were important but at the same time, their reputations, careers, even their lives depended on privacy. In order to make the women feel safe and comfortable donating their materials, the archivists worked with the women to ensure the access policy protected their privacy and was ethical to the user. She states that “when a woman deposits her poems, letters, journals, artwork, leather jacket, T-shirt, or a tape of her music or of a day in her life with us at LHA, we talk with her and ask her to write the accessibility proviso herself. That very act gives her control over how her life will be used by researchers.”⁴⁵ It was comforting to these women who were taking a risk by putting their records, and therefore themselves, out there for the public to scrutinize. Archivists have the duty to protect these women’s stories and to make

⁴² Ibid, 117

⁴³ Ibid, 119

⁴⁴ Ibid, 120

⁴⁵ Schwartz, “Archivist’s Balancing Act” 188

sure the donors feel as comfortable as possible with the process. Schwartz believes that “an archivist of any minority despised by the society at large must be willing to work with people uneasy about the records they have created before their history is destroyed.”⁴⁶ She also reminds archivists that “the donor is not the enemy. She is a victim of the situation that gives us reason to exist--the devaluing of human lives.”⁴⁷

Whether it be working out deeds of gift, access policies, working with dying donors and grieving families, or donors of sensitive materials, good donor relations is highly important to the success of archives. In order to effectively establish a respectful and trusting relationship with a donor while balancing ethical issues of legality and access, an archivist must be prepared for just about anything. For this reason, it is shocking and a bit worrisome that more literature does not discuss how to establish good relationships with donors and what to be prepared for in the process.

It is not only the lack of literature that is disturbing but also the anecdotal evidence of a lack of education on the subject at the graduate school level.⁴⁸ Ramos and Ortega claim that “when archival theory and management was discussed in library school, the idea of donor relations was barely glossed over.”⁴⁹ Looking back at the discussion of all of the different facets of an archivist’s relationship with donors, this seems somewhat irresponsible on the part of graduate programs. Of course, establishing relationships with donors can only be done in person, but at least having some preparedness for what they may confront would help archivists immensely. Donor relationships are complicated, as most human relationships are,

⁴⁶ Ibid

⁴⁷ Ibid

⁴⁸ The majority of archivists interviewed for this thesis stated that donor relations was not a part of their archival education.

⁴⁹ Ramos and Ortega, *Building a Successful Archival Programe*, 48

and deserve more attention by the archives field. They are essential to the success of archival institutions.

For this reason, I decided to have conversations with several archivists about their experiences in donor relations, specifically with grieving and dying donors. We discussed how to handle difficult situations with donors and their families, how to handle personal relationships with dying donors, and how to better incorporate donor relations into graduate education. Before I go into my research results, however, I wanted to discuss grief and dying as it has been defined and studied in psychological literature. Grief research helped define many of my research questions and provided an understanding about what donors would potentially be going through and the difficulties archivists may face when working in these situations.

Chapter 2

Understanding Grief and the Grieving Process

Before discussing how archivists deal with grief and the grieving process while working with donors, it is important to understand what the grieving process is, how people react during situations of loss, and how grief and grieving have been defined and discussed by professionals from the early 20th century onward. This chapter will cover major developments in the study of grief starting with Freud and ending with grief work as it moves into an online environment as well as highlight the importance of this knowledge for archivists in their interactions with donors.

According to Lecat Granek “the emergence of Grief as a topic worthy of psychological study is an early 20th century invention” starting with Freud’s grief work.¹ Before Freud, especially in the 17th century, grief “was often viewed as potentially fatal, and it was widely believed that grief could make you mad and even lead to premature death.”² However as grief research moved into the mid-20th century, these beliefs were fading out in favor of a more scientific understanding of grief. Granek believes that now “grief has been constructed as a pathological condition necessitating psychological intervention in order for people to heal as quickly as possible.”³ Grief is a curable illness that needs to be worked through in a professional manner in order for the bereaved to become a functional member of society once again. The goal is “to get people functioning and back to work in a timely and

¹ Lecat Granek, “Grief as Pathology: The Evolution of Grief Theory in Psychology From Freud to the Present” *History of Psychology*, Vol. 13, No. 1 (2010), 46

² *Ibid*, 50

³ *Ibid*, 48

cost efficient manner.”⁴Freud, however, believed that grief was not a quick process.

According to Granek “while Freud advocated that the person grieving had to detach their libido or their emotional energy from the deceased and sublimate it into other areas of their lives, he also argued that this is a slow and laborious process and that it is never completely resolved.”⁵

After Freud, many theories focused on the scientific treatment of grief and getting the bereaved back on their feet as soon as possible. In 1937, Helene Deutsch presented a theory that today has become quite common in grief literature. She believed that “unmanifested energy, in this case unmanifested or repressed grief, will resurface in other ways if not brought into consciousness and treated.”⁶ Granek asserts that the use of quantitative methods, “epistemologies, and experimental apparatuses were pivotal in transforming grief from a psychoanalytic concept to a psychiatric one.”⁷ The process of grief was beginning to be understood as a disease “with an etiology that could be predicted, managed, and subsequently treated by professionals.”⁸

Along with Deutsch, Erich Lindemann was also pivotal in the understanding of grief as a psychiatric concept. Lindemann “argued for the explicit intervention of psychiatrists in the grief process. He believed that psychiatrists should not only treat grief like a medical and psychological disease, but that patients should be monitored for normal grief reactions to see if they were doing their ‘grief work properly.’”⁹ Many psychologists today still subscribe to this line of thinking. Granek states that “in response to the growing trend of seeing grief as a

⁴ Ibid

⁵ Ibid, 52

⁶ Ibid, 54

⁷ Ibid, 57

⁸ Ibid, 58

⁹ Ibid, 59

disease, counseling psychologists have now begun to focus on developing grieving interventions and examining their efficacy.”¹⁰

One of the most influential works in the history of grief literature is *On Death and Dying* by Elisabeth Kübler-Ross. Kübler-Ross performed extensive research with dying patients in order to establish how people react when in the process of dying and when a loved one has passed away. Kübler-Ross believes that “in our unconscious, death is never possible in regard to ourselves”¹¹ which is why people have such strong reactions to death and the reality of dying. She states that “each one of us has the need to avoid this issue, yet each one of us has to face it sooner or later.”¹² Kübler-Ross also believes that a major issue people face today is a disconnect with death and dying, saying that “dying nowadays is more gruesome in many ways, namely, more lonely, mechanical, and dehumanized.”¹³ People talk about death in hushed tones and many times avoid the word altogether. The dead are taken care of in mortuaries instead of the home. Death and dying is no longer an intimate part of life even though everyone will face it in their loved ones and in themselves.

Kübler-Ross examined these interactions with death and dying in possibly one of the most lonely and mechanical places; the hospital. She met with patients that were on the verge of death and spoke to them about their feelings about dying, their treatment by staff and relationships with family. The interviews were observed by Kübler-Ross’s students as well as hospital staff. Out of this research, Kübler-Ross constructed a five stage model of grief: denial, anger, bargaining, depression and acceptance. ¹⁴

¹⁰ Ibid, 65

¹¹ Elisabeth Kubler-Ross, *On Death and Dying* (New York: Macmillan, 1969), 2

¹² Ibid, 16

¹³ Ibid, 7

¹⁴ Ibid, 1-35

The first stage of grief is denial. According to Kübler-Ross, “denial, at least partial denial, is used by almost all patients, not only during the first stages of illness or following confrontations, but also later on from time to time.”¹⁵ Denial is a coping mechanism for many grieving and dying people. The shock felt when one learns tragic news is sometimes too much for a person to process and “denial functions as a buffer after unexpected shocking news,” and “allows the patient to collect himself, and with time, mobilize other, less radical defenses.”¹⁶ The denial stage gives a person time to work through the shock and face death or grief in a more productive way. Kübler-Ross states that after denial, a patient can “then talk about his health and his illness, his mortality and his immortality as if they were twin brothers permitted to exist side by side, this facing death and still maintaining hope.”¹⁷ This stage may be difficult for an archivist to deal with as gathering records from a grieving or dying person has a certain finality to it. The archivist may have to wait until the donor is ready to face that a death has occurred or is imminent.

After denial, Kübler-Ross identified the anger stage; a stage that is probably hardest to deal with. She believes that the reason it is so difficult to handle or predict is “the fact that this anger is displaced in all directions and projected onto the environment at times almost random.”¹⁸ This is one frustrating situation an archivist may deal with when working with dying or bereaved donors. Anger can be placed on anyone at any time and the difficult part is understanding why the person is angry, and why they are directing it at you. According to Kübler-Ross, “the problem here is that few people place themselves in the patient’s position

¹⁵ Ibid, 35

¹⁶ Ibid, 35

¹⁷ Ibid, 37

¹⁸ Ibid, 44

and wonder where this anger might come from.”¹⁹ People working with the grieving and dying may not stop to think about why the person is angry and begin to take it personally even though the anger exhibited most likely has nothing to do with the object of that anger.²⁰ Kübler-Ross states that “we have to learn to listen to our patients and at times even to accept some irrational anger, knowing that the relief in expressing it will help them toward a better acceptance of the final hour.”²¹ Aside from family, friends, and medical workers, archivists may also become an object of this anger. In this situation they have to realize where this anger is coming from and try not to take it personally.

After the anger has subsided the dying move into the bargaining phase. Kübler-Ross states that “if we have been unable to face the sad facts in the first period and have been angry at people and God in the second phase, maybe we can succeed in entering into some sort of agreement which may postpone the inevitable happening.” She believes that bargaining serves as an attempt to postpone the inevitable. The person will ask for more time, or to be able to attend a wedding or one last visit with a loved one, in exchange for good behavior, promising to go to church, or whatever the dying or grieving person believes is a fair exchange.²² It also includes “an implicit promise that the patient will not ask for more if this one postponement is granted.”²³

After the bargaining stage has passed or has seemingly failed the bargainer, the person may experience depression. Kübler-Ross states that a person’s “numbness or stoicism, his anger and rage will soon be replaced with a sense of great loss.”²⁴ She concludes that it is

¹⁹ Ibid, 45

²⁰ Ibid, 46

²¹ Ibid, 48

²² Ibid, 73

²³ Ibid

²⁴ Ibid, 75

not helpful to try to cheer people up or tell them to be hopeful. It is more helpful to let them work through it and be supportive, even if you just sit with them in silence or listen to them without judgment.²⁵ This is something an archivist can do to help the grieving or dying person. While going through the records or making plans for a donation, the archivist can listen to the donor's stories, fears and hopes and at least help to alleviate some of the stress of planning for the end.

After the depression passes Kübler-Ross believes that the person will enter the stage of acceptance. The person will have “mourned the impending loss of so many meaningful places and he will contemplate his coming end with a certain degree of quiet expectation.”²⁶ Kübler-Ross warns that this should not be seen as a happy stage and that it can be “almost void of feeling. It is as if the pain has gone, the struggle is over, and there comes a time for ‘the final rest before the long journey,’” as one of her patients put it.²⁷ The family may need the most help during this stage as they may feel rejected by the dying person as he or she begins to separate him or herself from the world.²⁸ Kübler-Ross asserts that all of these stages or coping mechanisms last for different periods of time depending on the person and “will replace each other or exist at times side by side.”²⁹ Even with these stages laid out, everyone will experience the grief of dying differently. Archivists have to be prepared to face any or all of these scenarios with patience and compassion.

Kübler-Ross also learned from her patients that “it might be helpful if more people would talk about death and dying as an intrinsic part of life just as they do not hesitate to

²⁵ Ibid, 76

²⁶ Ibid, 99

²⁷ Ibid, 100

²⁸ Ibid, 101

²⁹ Ibid, 122

mention when someone is expecting a new baby.”³⁰ Everyone will face death at some point whether it is that of a loved one or their own. No real good or healing can come from avoiding talking about death, and facing it. It may help alleviate the stress of the dying and grieving as everyone treats it as a normal process of life. Skirting around the subject with donors may be the more comfortable option but may end up being more harmful to the donor in the long run.

Though Kübler-Ross’s work mostly focused on the dying, she also outlines the hardships the family faces after a loss. She states that after a person passes away, their problems end, but the family is still facing many challenges.³¹ Kübler-Ross found that relatives of the deceased “are often guilt-ridden because of very real angry wishes toward the dead person.”³² In anger, a person may wish harm to come to a loved one or even wish they drop dead, and when something terrible actually does happen, the person feels some personal responsibility and guilt for the tragedy. Family members go through similar stages of grief as were identified for a dying person.³³ Kübler-Ross states that “when we lose someone, especially when we have little if any time to prepare ourselves, we are enraged, angry, in despair; we should be allowed to express these feelings.”³⁴ Archivists should pay the same attention to signs of grief in family members as they do with dying donors.

The funeral can be a constructive time for expressing these feelings of grief and anger with the support of relatives, but after the funeral the bereaved begin to feel a sense of emptiness. After the funeral, friends and relatives go back home and the bereaved is left alone with his or her feelings. This is the time when “family members feel most grateful to

³⁰ Ibid, 125

³¹ Ibid, 142

³² Ibid, 143

³³ Ibid, 149

³⁴ Ibid, 156

have someone to talk to, especially if it is someone who had recent contact with the deceased and who can share anecdotes of some good moments toward the end of the deceased's life."³⁵

This is a time in which archivists can be important to family members of the deceased.

Archivists often spend a great deal of time with donors during the selection and appraisal process and could be a comfort to family members going through a recent loss. The best thing anyone can do for the bereaved is to listen and not judge, even if their anger, guilt or grief makes the listener uncomfortable. Kübler-Ross states that "if we blame them for daring to ventilate such socially poorly tolerated thoughts, we are blame-worthy for prolonging their grief, shame, and guilt which often results in physical and emotional ill health."³⁶ While in her work Kübler-Ross mainly focused on the dying, others who came after focused on those left behind, the bereaved.

Edgar N. Jackson's 1977 work *The Many Faces of Grief* approaches the study of grief from the point of view of the griever. He states, "I have tried to explore the nature of grief not so much from the point of view of the psychologist (who would examine its dynamics) as from that of a person who feels grief or observes at close range the grief of others."³⁷ Jackson found that grief was "an intensely personal and quite private response to life."³⁸ A person can never truly understand the emotions of another person and in Jackson's opinion, this should not be the main focus of those helping the bereaved. He states, "the skillful counselor, or for that matter the friend or neighbor, needs to know that his most useful function is not to try to

³⁵ Ibid, 156-157

³⁶ Ibid, 157

³⁷ Edgar N Jackson, *The Many Faces of Grief* (Nashville: Abington, 1977), 9

³⁸ Ibid, 10

feel someone else's feelings but rather to give this someone else the full *right* to feel his feelings.”³⁹ People need to try to be understanding and give them space to grieve.

Like Kübler-Ross, Jackson observed angry behavior from grief-stricken people. He states that “several studies in recent years have linked physical violence, acts of vandalism, and delinquent behavior to anger that is related to the unresolved grief of those who have been the victims of trauma over death.”⁴⁰ Friends, family and psychologists may become the object of direct anger. Direct anger is described as when someone close to the death becomes the object of explosive anger.⁴¹ This can happen for really no reason at all or can be exacerbated by past conflict. For example, family members may fight with one another and show anger toward one another as past conflicts come to the surface during the grieving process. This can especially be problematic directly after a death when family comes together to plan the funeral, deal with the deceased's finances and property or to read the will. This is also a time when archivists may have to navigate arguing family members, as some may be happy to give away records while others may not be cooperative. Sometimes the anger aimed at the archivist will not have to do with the collection at all. The archivist may just become an outlet for anger during times of intense grief. This does not mean that archivists should be afraid to work with grieving donors. They should try to understand where the anger is coming from and remember that it is most-likely not personal.

Some bereaved may feel intense guilt over the death of a loved one and Jackson found that sometimes people “may seek to avoid the full measure of blame by passing on to other persons or events or even things the responsibility for what has happened.”⁴² Blame

³⁹ Ibid

⁴⁰ Ibid, 15

⁴¹ Ibid, 15

⁴² Ibid, 22

may be placed on those that were directly involved in the death such as police officers, doctors, nurses, and mortuary workers and anyone else connected with the death. Tragic stories of death and malpractice suits brought by bereaved family members are frequently reported in the news. Even if doctors, E.M.T.s or the police department did everything they could, families sometimes need someone to blame for the death in order for it to make some sort of sense.

The bereaved may feel more intense guilt than seems appropriate for the situation or may try to deny that a death has happened. As Jackson states, “people assume that if they deny the fact of death, they will be relieved of the pains of their grief.”⁴³ This can be a tough situation for archivists if they are trying to go through a loved one’s things. In these cases, friends and family need to be supportive and willing to listen to the bereaved and help relieve them of these feelings of guilt and be supportive but realistic about the fact that the death has happened.⁴⁴ Jackson also notes that some grieving persons will display what could be seen as “inappropriate” behavior. One such example is humor. Dealing with death comes with a great amount of anxiety and “in fact, some philosophers, like [Paul] Tillich, say that death-anxiety is the basic human emotion. It underlies our other fears and apprehensions about the process of living.”⁴⁵ Humor can help people release emotions and reduce anxiety. Jackson states that “it is important to realize that humor is an effort to manage feelings that are perhaps too great to cope with normally. It would be unfortunate if anyone were so lacking in his perception of humor’s role that he would take such humor personally.”⁴⁶ Supporters of the bereaved must realize that even if it seems inappropriate, humor is a coping mechanism

⁴³ Ibid, 51

⁴⁴ Ibid, 23

⁴⁵ Ibid, 40

⁴⁶ Ibid, 45

and if it helps the bereaved relieve some anxiety then it should be allowed and they should not pass judgment without understanding to root of the humor. As with anger, archivists need to be aware of where the behavior is coming from and try not to take offense.

Grieving is a natural reaction to connecting with someone. Jackson states that “the pain that really touches us is when a part of ourselves dies in the process of another death. When we make an emotional investment in the life of another, we make ourselves vulnerable to the feelings of pain that can come when that other life ends.”⁴⁷ Dealing with grief can also be uncomfortable despite being a natural reaction. People outside of the grief many times do not know how to react to grief in another. They may feel uncomfortable, or not know what to say or do to help the grieving person. According to Jackson, “when a person may most need understanding and support, he may instead be greeted with impatience, resentment, and rejection.”⁴⁸ Kübler-Ross and Jackson have both observed that grief can carry a negative social stigma that stems from human discomfort with negative emotions and uncomfortable social situations. In order for healing to take place, the grieving must feel that their grief is valid and the people around them need to be supportive despite their discomfort.

By the 1990s, researchers began exploring different approaches to grief, some arguing against theories of detachment put forth first by Freud and then expanded on by Kübler-Ross and her contemporaries. Some also found alternative understandings of grief that argued against the theory of stages that has become popular knowledge to many because of the work of Kübler-Ross.

In “Continuing Bonds: New Understandings of Grief,” Klass, Silverman and Nickman note the shift in thinking about the effectiveness of “letting go” of the deceased in

⁴⁷ Ibid 102

⁴⁸ Ibid, 153

grief work. According to the authors “there has been a shift towards understanding that ‘letting go’ of the deceased--achieving ‘closure,’ as it is sometimes termed--may be less helpful than recognizing the importance of continuing symbolic bonds.”⁴⁹ They found that continued attachment was the norm for the bereaved rather than the exception, and that finding meaning in these continuing bonds was comforting to the bereaved as they worked through grief. The authors state that “any disruption between the world we know and the world we are confronted by, as a death for example, brings about a sense of loss of meaning. We need to reestablish, reconstruct meaning using psychological, social, cultural, emotional and cognitive resources.”⁵⁰ This is what the authors refer to as the Social Constructivist model. Finding meaning in continuing bonds can be very helpful in understanding loss and working through intense grief, especially when those continuing bonds provide positive experiences for the bereaved. This is where an archivist’s work can be important. By helping preserve a loved one’s records, essentially a piece of his or her life, the archivist is providing a continuing connection between the deceased and loved ones.

Brenda Mallon also supports the Social Constructivist Model as well as the Oscillation Model which is described as “going in and out of grief, remembering and forgetting, focusing on the past and paying attention to the present,” which Mallon states “seems to reflect the actual experience of the grieving process.”⁵¹ Mallon believes that grief is the price humans pay for love and relationships with others. Rebuilding the bereaved’s world after it has been shattered by loss can be difficult, especially if the loss was traumatic

⁴⁹ Dennis Klass, Steven Nickman, and Phyllis R. Silverman, *Continuing Bonds: New Understandings of Grief* (Washington: Taylor & Francis, 1996), 10

⁵⁰ *Ibid*, 11

⁵¹ Brenda Mallon, *Dying, Death and Grief: Working with Adult Bereavement* (London: SAGE, 2008) 10

because “trauma impedes grief.”⁵² Some may have to begin to redefine their sense of identity.

Responses to loss and grief will vary from person to person. Death and bereavement differ across cultures. Mallon states that “negative reactions to death and dying are not universal and personal philosophies will influence individual reactions.”⁵³ Currently, those studying grief believe that grief includes detaching from bonds with the deceased but also holding on to attachments. This is represented in the Oscillation Model. Mallon argues against Kübler-Ross’s model of grief stating that “grief is not a passive process, nor a series of stages that happen to the bereaved”⁵⁴ and if psychologists and those helping the bereaved recognize this it may help the bereaved become empowered. Archivists need to remember that while they are selecting collections, the donors are actively dealing with grief and the act of going through materials may bring up issues with continuing bonds and letting go.

For Mallon, grief is an active process and takes place in both personal and social realms. “The work for the bereaved person,” Mallon asserts, “is to weave the loss into their altered life, both personal and social.”⁵⁵ Attitudes about grief are also not set in stone for the bereaved. They change in response to and are affected by social forces, history, and economic changes.⁵⁶ Mallon has done away with the stages set forth by Kübler-Ross and laid out three main phases of mourning. The first phase is Early Grief or the protest stage. In this stage the bereaved may experience “feelings of shock, numbness, alarm, disbelief and

⁵² Ibid, 6

⁵³ Ibid, 8

⁵⁴ Ibid, 11

⁵⁵ Ibid, 13

⁵⁶ Ibid, 13

denial”⁵⁷ which are common at the first onset of grief. These feelings help prevent the grieving from being overwhelmed with feelings and emotions when the death first happens. The bereaved may also exhibit “emotionally flat behavior with sudden outbursts of anger.”⁵⁸ An abnormal fear of separation is common in this phase as well as insomnia and disturbing dreams. Suicidal thoughts may also present themselves as the bereaved yearn to join the deceased loved one.⁵⁹

The second phase is Acute Grief or the Disorganization phase. Anger is an emotion typically observed in this phase. According to Mallon, “there are also blame, irritability, continued denial or disbelief and an all-pervading sadness.”⁶⁰ The bereaved may feel a sense of despair in this phase, but may also feel relief. Despair can put a strain on relationships and could be draining for the bereaved.⁶¹ Mallon also notes that the “bereaved may blame themselves for words that were spoken or unspoken or actions taken or not taken.”⁶² The bereaved may worry about angry last words or important things they wish they had told the deceased when they were still available. They may worry that they did not seek appropriate care or regret the things they never got to do with the deceased. Mallon states that “the bereaved may regress in terms of skills and ability to complete tasks. He may become unpredictable, with mood swings, rejecting and demanding at the same time; the outer chaos he creates around him mirrors his inner storm.”⁶³ Some bereaved may search or wait for the deceased to return even after going to the funeral and seeing the body. Friends and family

⁵⁷ Ibid, 19

⁵⁸ Ibid, 20

⁵⁹ Ibid

⁶⁰ Ibid, 21

⁶¹ Ibid

⁶² Ibid

⁶³ Ibid

need to let the bereaved do this until they accept that the death has actually occurred and that the deceased will not be returning.

After the bereaved go through a phase of despair and disorganization, they will move into Phase 3, Subsiding Grief or the Reorganization or Adjustment phase. Mallon asserts that “like mourning, the reinvestment of emotional energy in the present and future is part of the process, not a single act.”⁶⁴ It is not a stage that is passed through and then done with, it continues throughout the grieving process as the person becomes able to deal with life outside of grief and pain. During this phase people oscillate between feeling the need to hold on to the deceased but at the same time needing to let go and move on. Archivists may observe a similar struggle in the decision to donate records, as is demonstrated in the next chapter. They need to come to understand that accepting loss is not a betrayal of the deceased, but a natural process of grieving, and friends and family need to understand that returning to normal patterns of life does not mean that the bereaved has severed bonds with the deceased.

In Mallon’s research, the dying did not want to avoid the topic of death; they wanted “to talk about the process of dying, losing control, being in pain, being dependent on others, being unable to make decisions about medical care and the leaving of loved ones.”⁶⁵ Grief from the dying and bereaved comes in many forms. There is no correct or single response to death and dying, and according to Mallon “a wide gamut of emotions prevail-fear, anxiety, sadness, loneliness, powerlessness, jealousy, relief and many others.”⁶⁶

Archivists working with the bereaved and dying will likely come into contact with some, if not all of these emotions. Mallon provides advice for counselors, friends and family

⁶⁴ Ibid

⁶⁵ Ibid, 23

⁶⁶ Ibid, 26

concerning how to navigate the emotional rollercoaster of grief in a way that will support the bereaved in their time of need. One of the best things people can do when working with the bereaved is build rapport which according to Mallon is “building a relationship which offers safety, emotional warmth, consistency, commitment and genuine care.”⁶⁷ Those working with the bereaved and dying need to make them feel comfortable. It does not matter if it is the “appropriate” way of helping or not. Offering support in ways that make the bereaved feel comfortable will encourage them to open up about their feelings and build trusting relationships with those around them.

Like Kübler-Ross and Jackson, Mallon warns that counselors and friends may become the object of anger or hostility, but should not take it personally.⁶⁸ The counselor, family member or friend will also be a source of support for the bereaved and it is important to be supportive even through periods of anger and frustration. Though, Mallon warns, “as people who wish to play a part in the healing process we have to accept that while we can validate the person’s feelings we cannot stop his pain.”⁶⁹ This is something that the bereaved have to work through and something that may last many years. It is hard to know how people will react to the death of a loved one. Every person grieves differently and things like culture, ideology, history and economy affect how a person grieves. Mallon states that “in reality, there is no set sequence for the experience of bereavement.”⁷⁰ Friends, family and counselors have to understand that, and be supportive as possible in a way that makes the bereaved feel comfortable and validated in their grief.

⁶⁷ Ibid, 31

⁶⁸ Ibid, 38

⁶⁹ Ibid, 38

⁷⁰ Ibid, 42

Mallon, Kübler-Ross and Jackson covered what to expect from those experiencing death and grief. Whether in “stages” or “phases,” all noted similar reactions. Just as archives have moved into the online universe, so has grief and grief research. Researchers are also attempting to discover how the universe of the World Wide Web can affect bereavement and grieving processes. In the book, *Dying, Death, and Grief in an Online Universe*, Carla Sofke, Kathleen R. Gilbert and Illene Noppe Culpit explore the ways in which technology affects the way society thinks about and understands death, dying, and grief.⁷¹ They state that though “dealing with illness, death and grief is common to all individuals, the emotional, cognitive, and physical reactions that accompany these experiences are now known to be affected by individual differences, culture, and historical period” which makes every person’s experiences of these life events unique, as has been stated by other authors above.⁷² The focus of the book is on thanatechnology, which the authors define as “communication technology used in the provision of death education, grief counseling, and thanatology research.”⁷³ Thanatechnology not only provides a way for legacies to live on digitally but also a new space for grief and bereavement to be expressed as well as for communities to form around similar grief experiences.

Humans living today are the first to have created vast online records of their lives, and after death will leave a “digital legacy.” The authors state that “depending upon the policies in place on a particular site and the decisions made by family and friends, the digital legacy of an individual could be removed quickly following an individual’s death or may

⁷¹ Carla J. Sofka, Kathleen R. Gilbert, Illene Noppe Culpit, *Dying, Death, and Grief in an Online Universe For Counselors and Educators* (New York: Springer Publishing Company, 2012), 3

⁷² Ibid, 4

⁷³ Ibid, xv

remain indefinitely in cyberspace.”⁷⁴ Facebook profiles, twitter pages, blogs, and Instagram accounts may exist years after a person’s death and serve to immortalize them in some sense online. These online legacies can also serve as places of grief and remembrance for the bereaved. Technology has provided many other ways for the bereaved to connect to the deceased and other bereaved people. Mourning rituals have moved to an online environment. Funerals can be streamed online, memorial sites can be set up for people to visit, griever make Facebook tributes, and online communities can be set up as support groups for grief. The authors note an interesting use of thanatechnology in Japan, stating, “Japanese gravestones use two-dimensional bar codes (Q R codes) which when scanned by a visitor’s cell phone allows the visitor to view photos, videos, and other information about the deceased.”⁷⁵

Not only does technology provide access for mourners who live far away or for some reason cannot attend a funeral, the online environment provides a community for the bereaved to grieve anonymously and to find support among like-minded people. Online communities can also provide support for disenfranchised grievers, such as those bereaved by suicide or the loss of a pet. These kinds of people may find communities of fellow grievers online that can provide support that the local community may not.⁷⁶ The authors believe that the online environment provides “refuge from a larger social order where grieving was perceived as unwelcome,” and it is available 24/7.⁷⁷ They also state that “the internet has the potential to provide a community of supporters who legitimize the griever,

⁷⁴ Ibid, 5

⁷⁵ Ibid

⁷⁶ Ibid, 9

⁷⁷ Ibid, 20

the loss, or both.”⁷⁸ Finding meaning after a great loss as well as feeling validated in grief is essential to the grieving process. The online universe can help foster these processes. It can also connect family and friends after a mutual loss through memorial sites, sharing videos and pictures of the deceased, sharing funeral and memorial information, and fond memories. The authors suggest that “the newspaper obituary is being replaced by online shrines where friends, family, and strangers can all remember the deceased together.”⁷⁹

However, online bereavement is not always a pleasant or positive experience. There are negative consequences that go along with sharing feelings and memories with the world, as well as having the deceased’s digital presence just a mouse click away. One bereaved father told the authors, “Someday I want to be able to sit and look at her pictures, even watch the videos, and remember how great it was when she was here. For now, accidentally seeing a thumbnail image in a directory on my computer or on my phone or on Flickr or on Facebook is enough to spawn an hours-long cycle of anxiety and depression.”⁸⁰ It may also be difficult for a loved one to come to terms with loss when the deceased still exists in some way in the digital world. The authors state that “computer-mediated communications and interactions with a physically deceased but virtually alive loved one may present significant challenges to the formation of a coherent narrative of the loss.”⁸¹ Thanatechnology has the potential to bring further grief and suffering to the bereaved but it has also opened the door to social support during grief as well as a digital legacy that can elicit fond memories and sustain connections with the deceased. Preserving legacies archivally can have positive and negative consequences for those left behind. Archivists must remember that the materials

⁷⁸ Ibid

⁷⁹ Ibid, 34

⁸⁰ Ibid, 9

⁸¹ Ibid

they collect are not merely records, but a piece of someone's life that should be handled respectfully.

This chapter has briefly covered how death, grief, and bereavement have been researched and understood throughout its history. It is not, by any means, a comprehensive study, but should give readers a general knowledge of grief research and the difficulties in working with grief that are discussed in the next chapter. In order for archivists to understand what their donors are experiencing when dying or grieving, it is imperative to have some understanding of grief and the grieving processes that people experience. The questions asked of archivists in the next chapter were based on an understanding of the grieving process as well as being rooted in an understanding of the importance of donor relations to the archival profession.

Chapter 3

Archivists' Experiences with Grieving and Dying Donors

This chapter will present the findings of ten personal interviews conducted with archivists regarding their experience with grieving and dying donors. Research was conducted using personal interviews as they would allow for candid discussions about a difficult topic that cannot really be revealed through simple yes or no questions. I narrowed my parameters to archivists who worked in collecting repositories because archivists working in these institutions would be more likely to have frequent interaction with donors as opposed to business or institutional archives. I had originally planned to speak archivists in western Washington, but had to expand my search area because of lack of responses. In order to locate potential interviewees, I combed through the list of members of Northwest Archivists and contacted people who worked in collecting archives, special collections libraries, museums and historical societies. As I received answers, many of the archivists revealed that they had not worked with grieving or dying donors but some were able to lead me to their colleagues or archivists at other institutions who had. Eventually I found ten interviewees from various institutions from five different states.

I conducted most of the interviews over the telephone as distance from the interviewees made in-person interviews impractical. I was able to conduct one interview in person and two interviewees chose to respond to the interview questions via email as their schedules did not allow for a telephone interview. I asked the interviewees seventeen interview questions that were broken up into three categories: archival background, working with grieving and dying donors, and donor relations in archival education. The interviews

lasted between thirty and forty-five minutes and were recorded using Audacity. Transcripts of the interviews were typed and then sent to any interviewee who wanted to review the transcript before it was used in the thesis.

In the first section of questions I gathered information about the interviewees' education, years in the field, whether their repository had policies regarding donor relations and if they had experience working with grieving and dying donors.

The archivists and special collections librarians who participated in the interviews came from a range of states, educational backgrounds and years of experience in the field. The interviewees will be referred to by numbers to protect anonymity. The following list will present the interviewees' educational backgrounds and years of experience:

1. Master's in History as well as a Master's in Library and Information Science and has been in the field for over twenty-five years.
2. Certificate in Archives and Records Management and has taken several classes from the Society of American Archivists. Interviewee 2 has been in her position as an archivist since 1987.
3. Dual Master's in History and Library and Information Science and has been in the field for thirty years.
4. Professional librarian since 1999 and has trained in rare books and special collections librarianship.
5. Received an MLS and has been in the field since 2004.
6. Interviewee 6 has a degree in Archives has been in the field for many years.
7. Degree in Museum Studies. Interviewee 7 works as a curator of collections has taken courses in basic archiving and digital archiving from SAA.

8. Master's of History with a certificate of Archival Management and has been in the field for eight years.

9. Interviewee 9 has a Master of Arts in history and graduated from an archives training program. Interviewee 9 has been an archivist for thirty-one years.

10. MLIS with a concentration in archives and academic reference as well as an MA in American History. Interviewee 10 has been an archivist since 2004.

The interviewees were then asked if their repository had any policies regarding donor relations. Surprisingly, most did not. Only three interviewees responded that they had some sort of policy written down. Interviewee 1 stated that her institution has “a full collections management policy that covers every aspect of reference services, arrangement and description, and donor relations” and that the repository had policies for deeds of gift, agreements for loans and exhibitions and that they had recently “updated the deed of gift to cover information for digitization of collections.” The institution of interviewee 6 has a collection development policy and “protocols about how to deal with collection development and stemming from that, of course, is procedures for dealing with donors or donor relations.” She said, however that they do not have “a specific guide or manual to tell us how we deal, how we interact with donors.”

Most interviewees responded much like interviewee 3 who said, “Unfortunately I don't think we have anything written down. I think all of us sort of have our own rules of thumb.” Each director in Interviewee 3's institution handled donor relations in their own way, with their own protocols. Two other interviewees did not have policies written down and one was unsure about the status of donor relations policies at her repository. This is

worrisome as collecting repositories depend on donor relations not only for building collections but for monetary and community support as well. It was also clear after speaking with the interviewees that many of them had faced situations in which grieving and dying played a major role. Many archivists face these situations as a majority of donor collections are coming to the repository at the end of a life. As interviewee 8 put it “The general nature of a repository is that people don’t usually give us things until they are downsizing, dying or moving so often our contacts are people who are getting rid of their stuff for a major life event, whether it be their own or someone else’s.” Having a donor relations policy or advice manual could help assuage the difficulty and awkwardness for both the donor and the archivist.

The next question dealt with the participants’ experience working with grieving and dying donors. Most of the interviewees shared stories of their personal experiences. Many of the experiences involved donors entering old age or battling terminal illnesses. Interviewee 3 shared these examples:

I used to work at the [University] and one of the retired faculty members was a very well-known composer who was definitely on his way out and I had to really go over to his house and decide the things that he wanted. It was a very difficult situation because his wife was really the caregiver there and he was very ill. I think he was getting into dementia at that point, so there were a lot of issues on the papers and I think there was a kind of urgency, he felt like, in getting these papers to the university. So that was one situation. I worked with another very elderly professor who had to leave... He was being kicked out of his office at the university because he’d been Emeritus for some years and they needed the space for younger faculty members. So the papers to him were very much a token of the loss of his position at the university. We went around and around on getting these to the library and I think his resistance to it had a lot to do with his sense that he was dying and that he was no longer an active faculty member.

Interviewee 3 also stated:

I dealt with the family of a woman, a very prominent person, important in society who had just passed away. Our former director who was very well

known in the community had made contact with the donor. They were actually very close friends. He had long since retired but he took me up there to their house to gather some of the family collection, including artifacts. It was a very tricky situation because there were two families. This woman was the second wife of the patriarch of the family, so the family of the first wife was there and the family of the second wife so it was a very difficult situation. The last situation I wanted to mention was dealing with a gentleman who was dying of very serious lung cancer and still smoked very heavily, unfortunately. So I went over to his house and his grandfather had been a photographer and had been involved in these panorama photographs.... He had a huge collection and was very wary of giving these to [institution] but definitely felt like he wanted to give them to us. At a certain point he wanted to know how we were going to preserve them and whether we could raise the money to preserve them and that sort of thing...Holding on to these things, I think was a very important part of holding onto life for him. It was a very unfortunate situation. He was literally on his deathbed in the living room.

Interviewees 4, 5, and 6 all dealt with donors battling cancer. Interviewee 4 related her experiences with two donors:

I work with writers who work in the science fiction and fantasy genre. The two writers that have passed away after I met them and after began working them were [donor 1] and [donor 2]. [donor 1] died a few years ago and [donor 2] died less than two months ago. So it's still kind of fresh to put it mildly. My experiences with [donor 1] were that she did not indicate to me that she was ill, I found out about her cancer about a week before she passed away. I had interacted with her at a convention and she made the decision to donate her papers to our library before I had any indication of illness on her part and she passed away very, very quickly after the news came out. They didn't announce her illness until she was already in hospice so I had been working with her as I do with all of my living authors because the vast majority of the people I work with are alive so we work sort of piecemeal, they send a box periodically. It's not necessarily a whole wave of things all at once; but it's an ongoing working relationship and, you know, that kind is the kind of relationship I had with [donor 1]. It was just an e-mail correspondence for the most part and boxes would occasionally show up. When she passed, actually, when the announcement when out I sent her an email and said "What can I do, how can I help?" and she responded and copied her sister who's the executor for her estate...I worked with her sister to get the remaining literary papers mailed her basically and her sister is the executor of records so when we have copyright questions or anything like that it all goes through her.

Interviewee 4 met her second donor:

Via email correspondence probably in my first year on the job here... I didn't meet him in person until he'd already been coping with cancer for a couple of years. I met him at Paradise Lost in person for the first time and the year before that at Chi-con which would've been August of 2012. I had met him a

couple of times and we'd had lunch together, that kind of thing. It was not an ongoing intimate friendship kind of relationship but it was a fairly warm acquaintanceship but I had never known [donor 2] personally when he wasn't going through cancer treatment. When we got to the point where— you know we talked a lot about the disposition of his materials and the kind of preparation that he needed to do and he indicated to me at some point that he was going to set up a literary executor and it was going to be these three people and after he passed his family then of course went in and started sorting out his papers and it turns out he had not done any of that. He had actually—everything got re-worked with the lawyers and he never got around to telling me so it all went into a family trust...He had donated a passel of materials while he was still alive and the family is still committed to making sure that the rest of his literary papers come to live here so they have been really wonderful to work with and I'm trying very hard to do things just on his timeline, their timeline to make it as easy as possible, but part of the challenge is of course I have to now go through and explain what I do and don't want, without actually flying out there and saying "this, this, not that." And we also have to navigate a lot of the electronic stuff...Jay was very active on social media, he had a blog for over a decade...

Interviewee 5 said, "I think as you probably have gathered is a lot of times we actually are dealing with this in one way or another." Her story dealt with not only working with a terminally ill donor but also putting together a launch of the collection with the added pressure of wanting the donor to see it before he passed away. She related her most recent encounter with a dying donor who was a travelogue filmmaker. The donor started his work in 1958, traveling to different parts of the world to film various cultures. He had done some of these films on Mexico, which Interviewee 5 became interested in working as a borderlands curator. Fortunately, the donor's wife felt that these materials were important and needed to be preserved. Interviewee 5 states that the reason his wife came to her repository was, "because she felt the urgency of doing something with her husband's materials, which she hadn't really seen in a long time because they had put it away and it was put away for a long time. They thought it was possibly valuable and that somebody should have it."

She went on to explain that, "with every first meeting you find out what's there and what the situation is. Anyway that's how I found out that he was someone who was passing

away...” Interviewee 5 noted that she found a professor who wanted to use the films in her course and that, “helped in the work that I was doing, to know that it was going to be used. So we proceeded to go ahead and accept it.” Interviewee 5 and the staff not only had to process the incoming collection but the film reels had to be edited together and migrated to digital form. She also planned a digital exhibition and a launch day where the films would be shown and student presentations exhibited. The project was ambitious but interviewee 5 stated that she felt “a sense of urgency in that I wanted him to see some of that work done.” She was excited that “he got to see the migration part of it, because he hadn’t seen them for four decades. Some of them longer because he had done them in the fifties.”

Unfortunately the donor did not live long enough to attend the launch but the event provided an opportunity for family and friends of the donor to see his collection. She stated that the donor and his wife, “had a lot of friends from all over the city and outside of the state so it was going to be an opportunity for their own community to come and see these films of somebody they really cared about.” Another unfortunate incident occurred during the work on the film. Interviewee 5 revealed that, “one of the vendors that we worked with very closely on getting the migration done, we worked with this company and it was basically two gentlemen and one of them also had cancer and passed away in November. And this is somebody who I had a relationship with even before this project. So it was a very emotional time.”

Interviewee 6 had also worked intimately with dying donors. She had worked with a donor of an important collection as well as the donor’s partner who had died around 2005. Both donors were dealing with terminal cancer diagnoses while working with her to get their collections in order. Interviewee 6 said that this particular donor was, “the first person that I

dealt with who was actively dying. And I would visit with her and collected her papers.” Interviewee 6 added that she has had “experience dealing intimately with two different individuals in the process of dying.”

The archivists interviewed shared a range of experiences working with the grieving and dying. Some intimate, some on a less personal level, but all difficult to some degree. To further explore what it was like going through the process of working with terminally ill or grieving donors, the interviewees were asked questions specifically focused on the acquisition process, including contacting donors or family members, appraising materials, bringing collections in, and dealing with donor anxieties regarding collection donation. The first questions the interviewees answered were “When approaching a recently bereaved family member about a possible donation, do you think there is a right time to discuss it? How do you handle this situation?” Though most interviewees did not have specific donor relations policies to guide them, they used common sense and experience to determine when it would be appropriate to contact donors or family members. Most interviewees stated that there really is no right time and that it depends on the people the archivists are working with. Interviewee 9 explained that his repository generally waits about a month before making initial contact, but was the only one to mention a general rule for the repository in handling this type of situation.

Interviewee 1 said that there was no right time and explained that she tends to, “follow the lead of the family.” In her experience, the families may want to have the situation handled quickly, or may not be ready to deal with the finality of transferring a loved one’s records to the repository. Interviewee 1 stated that, “often the families are motivated to get estates settled and that sort of thing and so they don’t want to wait. They want to have it

handled as quickly as possible, so sometimes it's almost at the point of death." Other times the family may not be ready to deal with the archivists. Interviewee 1 suggests to "let them know that you have an interest in their papers and when they're ready you let them take the lead. Put the offer out there and let them follow up when they feel comfortable doing it... You'll know from that initial conversation whether there's some immediacy to it." She also believes that families will let the archivist know if they are not ready to deal with it and suggest getting back in touch at another time. Interviewee 1 added that, "there's no right answer to this. I think it really about just being sensitive."

Interviewee 2 also emphasized the need to go with what the family is feeling and put yourself out there in a way that is not jarring to the family in their time of grief. Interviewee 2 believed that "it all depends on the people. I think it has a lot to do with how they approach you." She explained how she would approach the situation:

I wouldn't want to come over to someone whose loved one has just died and say, "You know, can we have all the papers? Can we have all of this stuff?" I think more if you meet with someone, you know, if you go to the funeral or if you somehow meet the person, maybe the wife of someone who's just died and are talking about their husband, you know, who may have been very important to [University] and then if that conversation goes well then it kind of would be good to say, you know, "It would be nice if your husband's papers were preserved so that his contribution to [University] would be documented." Because, you know, you don't want someone who's crying the whole time. You don't want to sort of say, "Now I want your husband's papers!"

Interviewee 7 had a similar approach. When attending the funeral of a potential donor, she would approach the organizer of the eulogy and ask for a copy. In this way, Interviewee 7 says that she has an, "opening to go back to the person who's written the eulogy in the following months and say we have your eulogy about your brother, or uncle or whatever it is and would like to have more in the collection about them."

Letting the donor or the family guide when the acquisition takes place allows the family to make decisions regarding the donation of collections without feeling rushed or harassed by the archivist. If the family indicates that they want the transfer to take place as soon as possible, the archivist can step in and help make the transition as smooth as possible. Aside from following the lead of the donor, other interviewees had different strategies that helped ease the acquisition process.

Interviewee 3 argued for knowing the situation and how important it is to understand the circumstances of the donor's or family's situation before going into it. He said:

Well, of course it depends on the circumstances and knowing the circumstances of the situation is extremely important. The other thing is have you made contact with these people before? Do they know who you are? A lot of times you're just doing this cold... As the university archivist at [University], you know, a professor would pass away and they would say, "OK, we're going to try and see if we can get his papers." I would usually wait at least two or three weeks, if not longer and I think you can start out with just a sympathy card that just says, basically, "We understand your situation and when you feel ready to talk to us we're here." That's basically what you can do at first without being intrusive. And the other issue is: what is the expectation of this family? In the case of somebody like a professor or somebody with a professional career, a lot of times there's the expectation that their papers are going somewhere. With families that are not that connected, sometimes they're surprised that anybody even wants their material.

Interviewee 10 similarly said, "I generally try to take into account what I know about the situation. Was this a sudden death of a young person? Was it a sad but timely death from old age? Was there a wasting disease? What were my previous relationships (if any) with the donor and family?" Interviewee 10 also uses connections within the community to set up meetings with potential donors or, "to mention the archives as a first step to bringing up the idea of donating collections."

Interviewees 4 and 5 discussed how important it is for archivists to establish themselves as members of the community they serve and establish authentic relationships with community members. This saves a lot of confusion when contacting potential donors. Interviewee 4 believes that the ideal time to discuss possible donation is “before they're bereaved,” though she does not believe that there is ever really a good time. She stated that:

It very much depends on if you're an established member of the community to begin with. What has helped in my work is that I'm an established member of the science fiction community so I am among the people that someone about to go through bereavement or who just has within this community would turn to for advice anyway. So then, at that point, what I have the option of doing is if there are materials I'm interested in, I can reach out and say, "Is there anything I can do to help; how can I help" and offer help that way, and I'm always very clear that I want what the family wants. It's not always a function of I can help you get things to me, it's I can help you make decisions that you are happy to live with.

Interviewee 5 noted that if you do have good relationships with the community, that a letter of condolences is a good first step. She approaches the situation by sending a letter “saying my deepest sympathy for them and knowing how important their material is and I include my card. You just don't know when it's the right time but you want to make sure that they know that their material is important.”

Knowing the situation before going into it may help archivists prepare for dealing with the needs of the donor or his or her family members. Being established in the community the archives serves also helps assuage the confusion, and sometimes frustration, that comes along with asking for a loved one's records. Ideally, the community would know who the archivist is and what he or she does, and realize the importance of donating records to the institution. However, knowing the situation or being known to the community is not always possible. Potential donors may crop up unexpectedly and the archivist may have to

handle the situation without knowing the details. Likewise, unless the institution has a good outreach program, the community may not even know that the archives exists. In any case, they are good goals to strive for to make the acquisition process easier on the donor and the archivist.

Interviewee 6 agreed that there is no right time, but says not to get intimidated by the idea of working with dying donors. In her experience, she found that it was, “best to be forthright and not hold back about talking to dying donors.” There are bad times, such as right after a person has found that they are terminally ill or if a loved one has recently passed away. Interviewee 6 stated that sometimes it just comes down to “common sense,” but added that, “it’s easy to put off contacting somebody you know is dying because you might dread talking with them about something that is impending.” Archivists should not avoid contacting potential donors because of the fear of a conversation about death. Eventually the topic will have to be broached and it is best for the archivist to have an open and honest discussion, or even just an open ear, rather than avoiding the topic completely. Otherwise, both the donor and archivist may miss out on an opportunity to preserve a legacy that suits both the donor and the institution.

The advice given by the interviewees boils down to the idea that there is no right time to solicit collections from the grieving and dying, but there are ways to make the process more comfortable for both the donor and the archivist. The archivist has to be forthright with the donor about impending death but also let the family take the lead in initiating the acquisition process. It is important to know the circumstances of the situation you are getting into before contacting the donor or family in order to determine the appropriateness of making contact. It is also important to establish yourself in your community so people are

already familiar with who you are and what your institution does in order to avoid confusion and upset during an already difficult time.

The next issue examined in the interviews was if there was a balance between building a personal relationship with bereaved or dying donors and working with them as a professional. The interviewees provided well thought out and insightful answers to how relationships are established between donors and archivists when dealing with such a difficult situation. Interviewee 1 envisioned the relationship as a “continuum,” stating, “I think that in these kinds of interaction you can’t become personal because you are essentially involved in a sensitive transaction and the ultimate transfer of materials to an organization. You’re operating as a legal agent, so I think there’s a certain professionalism that overrides any interaction whether it’s death and dying.” On the other hand, she noted that archivists often work intimately with potential donors, which can lead to friendly relationships, but at the end of the day the archivist is a professional and is performing a duty for the institution he or she serves.

Interviewee 2 said that it can depend on the relationship you had with the person before they became a donor. If they were already a friend, it can become a personal working relationship but if you have never met them before it will probably be a strictly professional one. Interviewee 3 noted that it can be a fine line for archivists to walk and can be a difficult situation to navigate. He stated that archivists should, “err, of course, on the side of professionalism,” but also notes that sometimes “it’s hard not to get involved with people.” Interviewee 3 also warns that when archivists do become personally involved with people, the expectations of the donors toward the archivist may change. He states that:

They're going to expect a lot more out of you and a lot of times you have to say, like for example, a lot of things that aren't appropriate for your repository, you're going to have to say you don't want them and they're going to say, "Well, this is my husband's library. He collected these books for years and years." Ninety percent of them have nothing to do with your repository or what you're collecting, so you have to say, "Gee they are great books but we don't want them."... That's the other thing too is that, and this goes, for not just dying or bereaved people, but anybody. There is an expectation sometimes that you're not collecting the materials for researchers, you're collecting them as a memorial to that person or as their private collection or something like that. That's something that's very hard to get away from...

Archivists need to be careful in this situation because giving preferential treatment to a donor would be unethical and unfair to all other donors whose collections are part of the repository.

Interviewee 4 found that in her particular community, the line between professionals and friends is, "very, very thin, and very, very permeable." This is because the science fiction community is a "mix of professionals and fans and often, professionals have come from the ranks of fans..." Friendships are easily established and maintained in her community and are an important part of the fabric of the community. Interviewee 4 states that it is important to be "friendly enough with people that they trust you with their stuff" but the archivist also needs to remember that they are working as a professional.

Interviewees 5 and 10 discussed the balance in terms of preserving legacies of the dead or dying and lending professional help throughout the process. Interviewee 5 believes that "there is a balance, absolutely, because you're there to support them in what they care about and preserving their legacy as they see it. So you have to be there for them and if you're sad, if you're upset that's not going to help them. To a certain extent you're building this relationship, whether it's professional or not or personal. Sometimes there's a gray line there." She approaches the situation by keeping in mind that her "main purpose there is to

help them along with this difficult decision. It's hard enough for people who are donating their material, they're healthy, but they still have a hard time letting go. And in these cases, they're dealing with both letting go of their legacy as well as, basically, this world."

Interviewee 10 especially emphasized the importance of showing respect for the donor and their records. He stated:

I think you do what it takes to try to make people understand that the collection is a part of their life and represents the life of a loved one. Taking time to impress that upon them and to be present and kind is really important because it telegraphs the kind of respect you are going to bring to your administration of the creator's records. That being said, it's important at a certain point to assess how the boundaries and roles of the situation are evolving and to make sure you are in a comfortable place as well. I guess the best way to go about it is to let them know that you are earnest in bringing your skills and knowledge to bear in helping to preserve and make accessible their family member's records. From there, I think figuring out the form of the relationship takes intuition. It's fine to be friendly, accommodating, and professional at the same time.

In a similar vein to interviewee 3's answer, Interviewee 6 discussed the problems that arise when relationships get too personal and how an archivist's decision making and professionalism might be affected. She stated that "the danger might be, depending on the circumstances, of course, that you would become too close of a friend to somebody."

However, she also noted that "even when somebody is not in the immediate process of dying that you can make decisions about what to acquire for any number of reasons. It could be convenience. 'I don't know if we want to keep this but let's take it now because I know you have to move out of your house,' or whatever the circumstance might be."

She explained that she "deeply loved both of the people who died; both of the donors who died. I really liked them, so that made the whole process emotional. If I knew somebody was dying and they were a professor of sociology at [Institution] and I had no personal

connection with them, of course I would be kind and considerate in all ways possible but I think there wouldn't be that deep emotional connection."

The answer interviewee 6 gave led perfectly into the next questions about grief which were, "Does the death of a donor affect you as an archivist," and leading from that, "Does the grief of losing a donor affect the way you make selection and appraisal decisions regarding their collections, either negatively or positively?" Again, for most it depended on the relationship already established with the donor and some believed that a person is impacted by the experience of working with what was essentially that person's life in document form. Interviewee 1 illustrated this point by saying, "I think we're all compassionate, empathetic people and, you know even if I haven't met the deceased, and I am working through the family that process of defining meaning around a life, it is deeply personal and intimate and you can't go through that space and not be impacted," especially when an archivist sees a donor's entire life, "consolidated into a few boxes of material."

Interviewee 3 believed that it should affect the archivist and, in fact, it is alright to be affected by donors as long it does not get in the way of professional decision-making. He stated:

It should. Let's put it this way, it always should. Again, it depends on the person. And I've had situations like that too where I've been involved with people, not personally but I felt their death very, very strongly. And it's very clear that it affects you in one form or another. You just have to be careful that it's not affecting you in professional ways...Feeling personally involved with somebody is OK in that you value their materials and you want to do a good job by them. You want to do justice by them. That's one thing. It's another thing to do things that are unethical just because you do have a relationship to that person. Like make deals with them in regard to your repository that you wouldn't normally make with other people. They may say, "I want my stuff restricted and anybody that writes a book on my collection has to have my family's permission," or unethical things like that we have to obviously steer away from.

Interviewees 4 and 5 emphasized the feeling of urgency and responsibility of maintaining and providing access to collections if the person is dying or has passed away. Interviewee 4 said that it affects her, especially if she “got to know them very well at all... When you know someone personally, the enormity of taking care of their materials and being the person who is literally responsible for making sure that their legacy survives, that weight becomes a bit heavier when you know the person personally.” She went on to say that “you feel that you would personally letting that person down if you don't do right by them. That's a solemn promise that you make. When... it's someone that you don't have a personal connection with, you can separate yourself enough; you can distance yourself enough that you can be more objective to a certain extent about what you take and what you don't.”

Interviewee 5 stated that it would, “definitely” affect her. The process of working with donors can affect archivists because, as Interviewee 5 says, “you're building this relationship with people. You're not a robot.” Though she says she would be affected, she does not believe that it would affect the decisions she makes in regard to the collection, except that at times she feels the “urgency of getting it done” so the donor has the chance to see the results.

Interviewees 2 and 8 agreed with interviewee 5 that the loss would affect them if the loss was a personal one, but would not affect their work. Interviewee 2 said that it would not necessarily affect her “because its, you know, if it's someone who's a personal friend it would of course, but if someone that we've interviewed here or we've gotten papers from” then it would not affect her as much.

Interviewee 8 similarly stated that it would depend on if the person was a friend, adding that his “job as an archivist isn’t directly affected by my personal relationships. If someone passed away I’d feel sad for the loss but, but I don’t think it would affect my job.”

For interviewee 10, the loss of a donor becomes motivation to make connections with potential donors within the community. He stated that he feels “sad to think that a chapter of history is closing if I knew the person, but I feel even worse when I find that the family or the donor organization threw away the records that documented that person’s life.” He added that the loss “motivates me and makes me feel better about being persistently polite in trying to preserve these records.”

Though most interviewees believed that a death affects them as an archivist on a personal level, or drives them to do their best, the majority stated that it would not affect their decisions regarding selection and appraisal. However, some noted things to watch out for, because, after all, archivists are still human and it is difficult sometimes to separate emotions from the process of appraising papers that document another human life. Interviewee 2 admitted that she tended to be a bit more sentimental about keeping materials because “that’s part of a person’s life.” Saving every little sticky note isn’t important but “notes that the person’s written down, that’s their thoughts and that’s how their lives are. I tend to be probably a little sentimental about it.”

Interviewee 3 said that he thinks archivist can be affected in a lot of ways, warning that “you have to be careful with those close relationships and make sure that you’re being savvy about what you’re taking and things like that. On the other hand, you know, in the long run a lot of times it’s a good thing to have erred on the side of taking too much material. I usually find it to be that way.”

Interviewee 6 said that she could see where archivists might be over-generous with donors. Interviewee 4 believed that archivists can be affected because they are still human but having collecting policies can help with this issue. She tries to make sure that she does not take materials that she does not “intend to keep.” In order to achieve this, she tries “hard to work with people ahead of time so that I’m not being offered things I don’t want. They’re being given the opportunity to actively curate what they’re donating essentially. I also think that one of the challenges is maintaining enough distance to be able to tell what is still valuable and what is not when you know the person personally.”

She notes that sometimes items that have sentimental value to her will be added to the collection, but that could be the case in collections where there is no personal relationship. She believes that the grief of losing a donor does not change the choices she makes because, as she states, “I write policies and encourage people to read them. They are very clear that what I’m looking for in particular is literary output first, and then representative sample of life as an outside ring for context for that. Because I have fairly strong policies that allow me to be flexible but are very clear about what I want...”

The interviewees agreed that a person’s appraisal decisions can be affected but most believed that they should not be if the archivist is taking the proper professional precautions.

The interviewees were then asked for advice in regard to what an archivist should do if they do find themselves in a situation where their professional judgment is affected by grief. Interviewee 1 said to “consider another career.” She added, “I think it’s always important to understand that you’re a professional first and part of being a professional archivist is abiding by the ethical statements that are well articulated as best practices in our profession, and if you can’t do that then it’s probably affecting other parts of your job too.”

Interviewee 8 similarly said “If you’re in a situation where a personal relationship is affecting your job you have to step away from the job then. That’s why we have collection policies. That’s why we have a system in place. If you have a collection policy then you follow your collecting policy.” Other interviewees pointed out the importance of colleagues and bringing in another person if you are feeling overwhelmed by the situation. Interviewee 7 pointed out that, as archivists, we “don’t make decisions in a vacuum. We have coworkers and collecting policies to keep us on track.” Interviewee 2 said she would “talk to a coworker about it and ask her advice.”

Interviewee 3 similarly stated that it is best to “work with other people in consultation as much as possible. Bring in other people that are in your repository, your colleagues, or if those people aren’t available, bring in colleagues outside your repository that can help you in that situation so that you have a more objective perspective.”

Interviewee 4 also discussed the importance of colleagues, stating, “I have not been through the situation where it has been a close personal friend, just someone who's a warm acquaintance, but that situation, given how I work, is likely to happen at some point and at that point, I would likely call in a colleague to assist me.” Interviewee 4 feels lucky to be in a situation where she has good relationships with her colleagues and can call on them for support and, “make sure I'm not making completely horrible choices in my grief.”

Interviewee 6 described a situation in which she used this advice, stating, “when I was gathering material from [donor] and [donor] I had another staff member go with me to help pack stuff up and load it up into the van and do all of that. So there was somebody else there to bounce off ideas about what to take and what to leave and I think that helped.”

The interviewees were pretty clear on their advice in this situation. If your personal life affects your job too much, think about getting a different one. This advice seemed a bit harsh as some people are just inherently more emotional than others, and it should not prevent them from being an archivist, and being emotional does not lead to being a bad archivist either. Other said that you may run into this and if so, find a colleague to talk it out with. Establish policies to guide you and be as professional and ethical as you can in any given situation. Unfortunately, many archivists are lone arrangers and may not have the opportunity to work with other archivists at their institution. Though as some of the interviewees suggested, it is perfectly reasonable to elicit the help of archivists in other institutions or colleagues in other departments at the archivist's own.

The interviewees were next asked questions about their interactions with donors after contact has been made and the archivist is in the field working alongside the grieving or dying donor. The questions were geared toward exploring whether archivists had experienced some of the difficulties that come along with the grieving process and how they handled them. They were first asked if they had ever been the object of anger or blame from the bereaved and if so how they handled the situation. Only interviewee 6 had been in a situation dealing with anger or frustration on the part of the bereaved. She described a situation in which her donor's former lover came to the repository and demanded that Interviewee 6 return the letters she wrote the donor. Interviewee 6 had to explain that the letters now belonged to the institution. Interviewee 6 soon realized that the display of frustration and anger was not just about the records. She stated, "I realized when she was in my office and she started to cry and I had to deal with that, I realized even coming up to the [institution] and wanting to talk to me was a part of the process of grieving." Interviewee 6 became, in a

way, like a grief counselor for the grieving woman. She talked with the woman about the donor that they were both loved and tried to be as supportive as possible. Interviewee 6 noted that these situations are dealt with on both a personal and professional level, stating that, “you’re dealing personally with another human being and so that’s very personal. On the other hand you’re doing it because you’re an archivist and you’re the curator of a particular collection.”

Other interviewees dealt with anger and tension between family members after the death of a donor. Interviewee 5 spoke about a situation in which she was dealing with fighting between siblings. She explained that she was not the object of the anger, but “there were two gentlemen, two brothers... and their mother had just passed away and one was made the executor and the other one was essentially the historian of the family. Both were pretty involved in different ways and unfortunately there was some infighting within the family.” She stated that she dealt with “by always meeting with both of them as much as I could. Obviously if it was something that only the executor had to deal with then I would just deal with him and vice versa. But I tried to convey the same message to all of them.”

Interviewees 7 and 8 noted that sometimes donors can be disappointed that the archivists weren’t interested in certain materials and can sometimes be suspicious of archives and what they do and why they would want a relative’s collection in the first place.

Interviewees 3 and 4 said that they had typically had good experiences when working with family members. In interviewee 3’s experience, most people were grateful that someone was helping sort out the records and noted that, “if there is anger I think it’s usually directed at the other family members and things like that. I’ve seen that situation where they felt, ‘Why are you giving away my stuff?’ So, nothing directed to me personally, luckily.”

Similarly interviewee 4 stated:

Luckily I have not. Thus far, my experiences with the bereaved have been that of everybody's very polite and very careful and we're trying our darndest to cope with this in ways that are kind to one another and in recognition that things may be difficult but we're doing the best we can. I have been lucky in that I have not had people express anger at me partially because the bereavements I have been through have been planned for in the sense that I was known to the people who would be the executors who're dealing with the estate before the person passed. It was not a surprise to anyone involved.

Thankfully the experiences of the interviewees have generally been positive ones, or as positive as they can be under the circumstances. Being courteous and understanding of the situation goes a long way in establishing a positive relationship with family members and keeping all family members on the same page can help quell arguments later on.

When the death of a donor occurs or when a donor is in the process of dying, an archivist may end up spending a good amount of time with donors or their family members. I wondered if, in these situations, archivists were put in the position of a “grief counselor,” listening to stories, helping donors work through the grief of dying or of a recent death, and how they handled the situation. The donors are not only dealing with the fear and sadness of dying and death but the idea that their collection, a representation of their life or the life of a loved one, is no longer going to be in their hands. It represents the ending of a phase in life, and for many that can be terrifying. A few interviewees said that they had not been in this situation, but others had and revealed that this is a scary time for elderly donors and a difficult one for the bereft. Many also believed that this comes with the territory of donor relations that archivists find themselves in these situations.

Interviewee 1 explained that she has, “worked with a number of people who are very elderly and whether that’s donating collections or whether it’s thinking about making a financial contribution, and it’s a very, for some, frightening point in their life” The donors are

aware that “their time is limited on the earth and they want to make sure their affairs are taken care of but they’re not ready to let go yet. And, so, working with an archivist is both acknowledgement that they’re dying, or dying soon, and then, building trust as they relinquish control over the meaning of their lives to someone else.” It is essential to build that trust with donors in order for them to feel comfortable letting go of the records.

Interviewee 2 described her role in these situations as that of a listener, stating that the archivists needs to “listen sympathetically, even though you don’t have time to do it, you still do it... They may spend the whole day talking about it and you’re sort of stuck. And you don’t let them know that you’re stuck.” Archivists sometimes just have to “go with the flow” as each donor will be different and each will need different types of support from the archivist.

Interviewee 2 also discussed the problem that arises when a donor is feeling anxious about donating a collection, wanting to let go but not quite being ready to. She said that she would tell the donor ““Well, you know, when you feel the time is right we will be very interested and I would be glad to come to your house to help out; to pick up what you have and do other stuff.’ But I would just say, ‘This is not for me to decide. When *you* feel the time is right, I will be glad to assist you with whatever you need. Advice, come to your house, whatever you want to do.’”

The answer that interviewee 3 gave reiterates the importance of listening and being available and willing to help when time permits. He noted that the archivist has to be aware of his or her limitations as they are not trained therapists but also said, “most of the time, nine times out of ten it’s just having people to listen to.” He warned that sometimes people can get

attached and start calling at work to talk, but he believes that, ‘the most important thing is telling someone that you’re available... especially when you are negotiating with them about the collection, you want to say, “Whenever you want to talk give me a call and if I have the time I’ll do that.” Archivists often have overbooked schedules but sometimes it makes all the difference to donors when the archivist makes time to be available and to listen to the donor’s concerns.

Interviewee 4 discussed how she handled one such situation:

I had a faculty member's wife— I helped at the regional history center and university archives with cleaning out a late faculty members office and his wife was just bereft and I was the person who was there helping her clean out the office... To a certain extent you make decision about how much you're willing to share. I'm...an emotionally open person so I was able to try to listen with compassion and provide what solace I could. She was clearly still grieving very, very much I mean it was very fresh so you know... I do the best I can and I just try to be kind and compassionate because I think that everybody who's going through it deserves that as much as we can offer it.

Interviewee 5 noted that these sorts of skills should be used even if the person is not grieving or dying. To her, donors are “just telling you that story about the collection. That’s just part of the job, I think, talking to donors.” Part of the job is interacting with donors and sometimes that means being an open ear and an open heart for those facing tragic circumstances. The best that archivists can do is listen and be compassionate and do everything within their professional power to ease the situation and build a trusting relationship with donors and their families.

Lastly, the interviewees were asked if they had any advice for new archivists entering the field, specifically regarding interacting with donors and their families. Interviewee 1 suggested that an internship is a great place to learn skills needed for donor relations, noting that it is hard for a person to understand how they would react in a situation without actually

trying it. She stated that, “It has a lot to do with your own personal skills and your ability to be empathetic and I think that mentoring or interning with students can bring them along to the point where it’s comfortable for the donor and the student. I think that observing that process more can build confidence and help develop those skills.” She also noted that educators could use anecdotal experiences in the classroom but it would not be quite as effective as having the experience firsthand, and some people will just be better at those types of interactions than others. Personality can play a vital role in learning to work with donors well.

Interviewee 2 pointed out that every experience is going to be different. The archivist has to learn to be flexible. One experience working with a grieving donor will not be like another and like interviewee 1, she suggested that an archivist’s personality can play a big role in their interactions with donors. Interviewee 2 stated that each situation is different and , “You can’t just go by the book. I mean, that never works.” Because of this she thought it would be a hard thing to teach, especially if the student’s personality conflicted with the ability to build sympathetic and trusting relationships with donors. In the same vein, interviewee 4 believed that it is important to “work on your emotional intelligence,” because “every time is different with every donor.” Listening and communicating accurately are important to building relationships with donors. She notes that eventually the archivist will get familiar with certain types of donors and the best ways to work with them, but will still have to be ready to deal with all sorts of situations that can crop up.

Interviewees 5 and 10 emphasized the importance of establishing relationships with donors and the community. Interviewee 5 said that archivists need to “understand that it’s all

about relationships and the sooner you establish those relationships, the easier everything else will be that follows because people are likely to have it be a smooth process if everybody already has a solid working relationship.” She continued, stating, “Even if it’s just that you’ve been introduced once or twice to one another, being a known entity when people come to the point of crisis makes the whole process a lot easier for everyone involved.”

Interviewee 10 believes that “everything we do is about context and relationships. We are building relationships of knowledge within collections and between collections and the community. Our collections document the connections within our communities as well.” He believes that if archivists approach situations “with respect and empathy” then they should try not to get too nervous about working with the grieving and dying.

Interviewee 6 recommended being as straightforward as possible with donors from day one. She gave this advice:

In terms of dying donors, I would say early on be as straightforward and clear as possible. Say the word “dying.” You could use euphemisms like “after you’re gone,” or you can just be straightforward and say “after you’re dead.” I think what you want to do is cut through all of the social niceties. That can often be a barrier to talking directly to a dying donor. Frankly, dying donors don’t have a lot of time to fool around. They need archivists to be forthright, honest and straightforward even in the language that they use. I think when both [donor] and [donor] were in the process of dying I could have been a little bit more straightforward with them. I always talked with them about the importance of their own personal papers. I wanted to reassure them and to make sure they knew that their legacy would live on in their collections and that made a big difference to them. They wanted to be reassured. They wanted me to tell them that all this work in acquiring their collection really meant something. And you know, to this day, the [donor] collection is the most heavily used collection of all of the materials we have. Her photographs are reproduced. Her rights are cited. Her collection pops up all the time. You know, I wish I could tell [her] that what I predicted would happen, in fact, did happen! Before there was no scholarship because the papers were not preserved and made available, but now they are and there’s a direct cause and effect in acquiring her collection. I wish I could just...I wish she would know, somehow, that it made such a big difference in contemporary scholarship.

Interviewee 3 said the thing that helped him was working with experienced archivists and doing research. He stated, “I think that’s helped me a lot. One of the experiences I had in Wisconsin was going with one of the seasoned professionals there to work with a collection of someone who had passed away and she had a lot of good experience to impart. So I think working with an experienced person.” He also advised to “think about your own family and friends and your own situations that you’ve been involved in. That’s really important too. And read up. There’s so much literature out there. You don’t have to get into some of this technical stuff, you know, but there’s plenty of very accessible literature in this field.”

The interviewees provided wonderful advice regarding how to deal with grieving and dying donors from their own experiences, but I wondered how these skills could be learned before new archivists were thrown into the trenches. The interviewees were asked several questions regarding how donor relations could or should fit in with graduate education. First they were asked if archivists should have an understanding of grief and the grieving process. Everyone answered in the affirmative. Interviewee 6 believed that this sort of education was necessary because “as archivists we often deal with donors at life’s transitions. The donor is either retiring or they’re moving from a big house to a smaller house or they’re moving into a retirement center or they’re dead or in the process of dying.”

Interviewee 3 also stressed the importance of this knowledge, and believed that it was not adequately covered at the graduate level. He stated that “so much of education deals with the technical side of the profession, which is of course important, but I think we forget sometimes that a lot of it is this interpersonal stuff. I think little by little people are coming around to that idea.” He believes that knowledge of donor relations is an invaluable skill to

have because, “it’s a lot of the job that we do. Especially aging. Every day I deal with elderly people.”

Interviewees 1 and 2 also suggested role playing as a way to practice being in certain difficult situations with donors. Interviewee 2 also noted that students need to know how to handle working with all different types of people. Practicing “how you would approach different types of people,” could help students build communication and coping skills that would benefit them later on in the field. Role-playing would be something that could be done easily in the classroom and would not cost the students or the department money like an SAA class would.

Interviewee 4 believed that having some sort of education in grief and the grieving process would be especially important for young archivists. Many students coming into the program are younger and may not have suffered a devastating loss and therefore may not have an understanding of what people go through when a death occurs.

The interviewees were then asked if this topic was discussed in their own graduate education. This question was met with a resounding “no.” Some said they had education in some general donor relations issues, but working with the elderly, dying or grieving was never touched on. I then asked them if they thought donor relations *should* be covered in graduate school. Everyone agreed that it should. Some then asked a question that had been lurking in the background of the conversation. How do you teach something like this? Interviewee 1 suggested that “internship based activities and case studies are probably the best way to do it.” She added, “We look at donor cultivation we look at deeds of gift and that sort of thing but we look at it with an eye towards the collection, not the people.” Interviewee

5 suggested that having “discussions and stories around it would be helpful. Just visiting your local archives, at least that’s what we do here when they bring students from the graduate program as an orientation. Part of what I talk about is my several duties including reference instruction and donor relations, and I think having some introduction to that would be good.” Interviewee 3 stated that it is important even if the student is not looking to go into a position where working with donors is a priority because, “you never know at a certain point in your career if you’re going to be asked to maybe take a position where you have to do donor relations.” Archivists who originally went into the field as a processing archivist could end up managing a department later on in their careers and need to know how to handle the human end of the job.

Since all agreed that donor relations should be covered more heavily for graduate students, the interviewees were asked if having education in donor relations would have been helpful to them as new archivists. Interviewee 1 felt that it couldn’t hurt but that it really comes down to personality traits and she was unsure how something like that could be taught. She said:

In this job it’s one of the things that’s expected of us but it’s hard to teach, you know? It’s not a quantifiable act. It’s kind of like teaching to teach. There is a lot that you can learn in terms of best practices and pedagogies but it really comes down to your ability to interact with people on a personal level. And to some degree that’s true for donor relations as well. You have to be the right personality. You don’t have to be extroverted, necessarily. And I think even someone who normally gets along really well with their donors is going to have that experience where if they met this person at a party, they probably wouldn’t have hit it off, you know? And they don’t hit it off in the donor context either. Some people want a really business relationship. Some people want to be validated, you know? That’s really what they’re after. Some people like to do the control/power thing. It’s different every time. It’s just, maybe, learning how to deal with a range of different kinds of people. And I’m not sure how to teach that. I mean, maybe there are some psychology courses that can help you read people better.

Interviewee 3 felt that he was lucky to have gotten some donor relations education through an apprenticeship program and feels that hands on work with trained professionals is important in when navigating the world of donor relations. He brought up the point that many archival and library science programs are now online, which is convenient for the students but noted that, “you don’t get that experience in working directly with professionals.” He added that, “it’s a very delicate situation so I think going along with people [is important].”

Interviewee 4 felt that she would have benefitted from some sort of education in donor relations. She said, “by the time I got to my curatorial position that I have now, that I’ve held since 2004, it would have at least allayed a large portion of the imposter syndrome that invariably pops up as a woman in a professional field because I would have felt like I had more tools with which to do things and sort of move myself towards the model of what I needed to do.” She went on to say, “I had good examples at previous parts of my career and I tried to work from those but having a little formal training or a little bit of— a little toolkit that would have given me more confidence in my own would have been very helpful particularly early on.”

Other interviewees felt that it would not have hurt but that it may not have been essential either.

The final question asked of the interviewees was if they had any further advice about how to incorporate donor relations into graduate education. Interviewee 2 admitted that she does not know how much it is covered now, but there are important things regarding donor relations that need to be discussed such as “publication rights, copyrights, depending on what

it is.” This is important because donors may not understand how the transfer process works and what legal rights they have. Interviewee 2 believes that this is especially important because, “people are so worried about it. ‘Oh, my things! My things!’ And I said ‘You know, it’s always here.’ I always kind of talk about, you know, if it’s hiding in an attic somewhere or put away in some cousin’s back room, no one will have a chance to see it but if you have it over here everyone has a chance to learn from these experiences. “

She also discussed how the loss of control over records can be scary for donors and she commented that “it’s pretty scary. So I think if you tell them how important it is and it’s always available. Whenever they want to come look at it, it’s right here. We can scan them and put them online. We can do all sorts of stuff. So I think that would be important to talk about in class.”

Interviewee 3 reiterated the importance of apprenticeships and practicums that allow students to work hands-on with a professional. Interviewee 4 suggested “a one-day or half day workshop for students.” She believes that “it should be strongly encouraged for every kind of librarian or archivist not just people who think they’re going into special collections or archives work.” Interviewee 5 suggested:

At least having orientation, working with your local archivist and having them talk about donor relations and having those sort of conversations about, “What happens if this? Have you had this situation?” Those are the types of questions that come up and at least when the students are asking it becomes a little bit more real or at least more timely. I’d expect that you’d be more interested in hearing the response and maybe you’d digest that better as opposed to a course or a day on donor relations.

Interviewees 6 and 7 suggested integrating it into a selection and appraisal course or a course on collections management. All of these suggestions have merit and could be worked into

existing archives programs. Of course it depends on the way the program is set up and budgetary concerns but programs could at least apply a few of these suggestions. Even just a class period discussing issues of grieving and dying and how that fits into the archivist's job would be better than never broaching the topic at all.

The interviewees provided insightful anecdotes and practical advice for working with the grieving and dying as well as suggestions about how graduate schools could integrate education regarding grieving and dying donors into the curriculum. They agreed that understanding grief and grieving was important in the archives field as many of the donors archivists work with will be at some sort of life transition, whether it be dying, after a death, retirement, or moving into a nursing home.

The interviewees drove home that there is never certainty in a situation where grief and dying is present. The best the archivist can do is to establish a good relationship with the community. Getting to know donors before dying or grief can alleviate confusion or awkwardness in an already stressful situation. Archivists need to be sympathetic and understanding of what the donors are going through, but also uphold professional standards while working with the bereaved and dying. The interviewees suggested that doing something as simple as just listening to the donor or family members can go a long way in establishing a trusting relationship.

They emphasized the importance of education in donor relations, especially when faced with grieving and dying donors. Most of the interviewees did not have skills in donor relations when they went into their first positions, but felt that at least a class on donor relations or grief would have helped them navigate the tough situations with donors that many archivists face almost daily.

Conclusions

Donor relations is an integral part of the archives profession. Without collection donors, many archives would have no reason to exist. Archivists very often work with elderly donors or bereaved family members; people who are at a transitional phase in life. Archivists working in collecting repositories will face grieving and dying donors most often. However, those in institutional repositories may also deal with situations in which grief plays a role. Losing a job or retiring can bring similar grief responses as loss. Unfortunately, in examining the literature and responses from the interviewees, it seems that donor relations is not well covered in graduate education or often discussed in archival literature. Death and loss are difficult topics to discuss, and most avoid the topic, but death and loss are part of life for every person. It is time the archives profession faced the difficulty and start discussing how to work with donors who are grieving or dying. If this does not happen, the situation can never get better for the archivist or the donor. As professionals, archivists owe it to their donors to make the transition of their cherished records as smooth as possible, because without the donors many archivists would not be employed.

Geoff Wexler and Linda Long opened the doors for exploration of the topic with their article “Lifetimes and Legacies: Mortality, Immortality, and the Needs of Aging and Dying Donors” and provided wonderful insights into what it is like to work with the dying and bereaved as well as how important archivists and archives can be at the end of life. Unfortunately, others did not take their lead and the literature has been mostly silent regarding the topic. The purpose of this thesis was not only to illustrate the complications that go along with working with the grieving and dying but also to demonstrate that

archivists *are* concerned about donor relations and believe that it is a topic that deserves more discussion both at the student and professional level.

The insights gained from the interviews with archivists who have had experience working with the grieving and dying are invaluable to young archivists just entering the field or even to experienced archivist facing issues with grieving and dying donors. Working with any donors can be an unpredictable and awkward experience, but adding grief to the equation only further complicates the situation. There are valuable nuggets of advice that archivists can take away from the discussion.

The most important thing for archivists to remember is that not all donors react to grief or dying in the same way. This was a main concern for the interviewees. Every experience working with a donor will be different from the last. The archivist needs to be flexible and understanding in her or his dealings with donors. An understanding of the grief process can help archivists navigate the varying emotions that the bereaved, and maybe even the archivist, experiences after the loss of a donor.

Some interviewees felt that personality has a lot to do with how an archivist will handle the situation. This may be true but I also believe that archivists can learn ways to deal with these situations even if they do not have the ideal personality for donor relations. Listening and observing are of utmost importance. Archivists can learn a lot about the donor's concerns just by taking the time to hear what they have to say, even if it takes up a small part of the day. Archivists will also be able to recognize patterns in donor behavior. Paying attention to these things and also being aware of where the donor's behavior is stemming from, such as situations of dying or grief, will help make the situation more easily navigable.

Archivists should remember that there really is no right time to ask the bereaved about donating personal papers, but there are better times than others. Going up to a bereaved, sobbing relative during a funeral and asking for papers will never end well. However, sending a sympathy card or taking time to make a phone call and letting the donor know that you are there for them when they need you is a good place to start. As many of the interviewees said; follow the lead of the family. Let them know that you and your repository exist but give them time to work through the grief and make a decision about whether or not to transfer the papers. Establishing oneself in the donor community so the archivist is known to donors and family members before a tragedy is another way to ease the situation. People do not always know what an archivist does or what an archives is and may react suspiciously if a random person comes up and asks to take their loved ones papers. Establishing relationships early on is a great way to avoid painful situations.

Archivists may also find themselves caught up in the donor's range of emotions that come with death, such as anger or sorrow. It is important for archivists to be there for the donor and especially to listen to them as they work through their grief. It is also important for the archivist to remember that the anger, frustration, or sadness that the donor may express is not his or her fault. These reactions are a natural part of grief and coming to grips with death and would be happening whether the archivist was there or not. It is best to not take these reactions personally and try to empathize with the donor. Sometimes taking the time to listen, even when you do not necessarily have it, is part of the job when working with people, especially when dealing with something as intimate as a loved one's legacy.

Even archivists can get caught up in grief when working with donors. Many times, the archivist has established a relationship with a donor whether it be an acquaintanceship,

friendship or a professional relationship. When a donor dies, it can affect the archivist to varying degrees. As the interviewees said, archivists are professionals, but they are also human. I do not think, as some of the interviewees suggested, that an archivist should consider another career because grief affects his or her decision making. However, it is important for archivists to recognize if their professional decisions are being affected by the loss of a donor and if so, there are ways to alleviate some of the pressure. Colleagues can be an invaluable support system in situations such as this. They can provide a hand in the decision making process and make sure that the archivist is making decisions about collections for the right reasons, and not just out of grief. If colleagues are not available, such as in a lone arranger situation, archivists from other institutions, or trusted friends from other departments in the archivist's institution may also be willing to help. They can at least be an open ear and provide a sounding board for the archivist's concerns. Having a collections policy that succinctly outlines the collecting parameters is also a helpful way to keep decision making professional.

There is no one correct way to handle situations with grieving and dying donors. There are, however, better ways to handle those situations. Learning to deal with these situations in a professional manner is important and this does not have to begin when the archivist is thrown into the situation with no prior experience. Graduate education could provide at least some insight into how to work with the grieving and dying and some tools that could later be taken into the field. It is hard to know how exactly to convey this information in the classroom, but it should not be ignored because of the difficulty. Having a class dealing specifically with donor relations would be a good place to start. Even having a few days long seminar could provide some skills that would make the transition into the

work environment less difficult. Many of the interviewees said that they did not know how working with donors, especially those grieving and dying, could be taught. I do not believe that there is any way to teach it in the traditional sense. It has to be learned through experience. However, taking the time to discuss the issues that go along with working with elderly or bereaved donors will provide insight that students can carry with them into the field. Probably the best thing Graduate education can provide for students is internship opportunities and especially the opportunity to work with professionals on donor visits. It is hard to visualize what the experience will be like until it is actually taking place. Giving students the chance to observe archivists' interactions with donors or family members and provide a safe environment to explore difficult situations and ask questions about how these situations can be handled.

This thesis was inspired by a particularly poignant donor visit and it completely changed the way I understood donor relations. Suddenly, donor relations had a human element that was impossible to ignore. It was no longer about which documents to keep, contracts, deeds, or legal issues. It was about boxing up the life of another human being. My hope is this thesis helps to further open up the discussion about working with grieving and dying donors and provides some insight for other archivists struggling to answer these same questions.

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Appendix

Interview Questions

Introductory Questions

1. What is your archival education and how long have you been in the field?
2. Does your repository have policies regarding donor relations? If so, what are they?
3. Have you ever had experience working with grieving or dying donors or their family members? If so, can you tell me about your experiences?

Questions Regarding Grieving and Dying Donors

4. When approaching a recently bereaved family member about a possible donation, is there a right time to discuss this? How soon after a donor's death do you feel it is appropriate to have this discussion with family members?
5. When working with bereaved or dying donors, is there a balance between building a personal relationship with them and working with them as a professional? Is this part of the job when working with a donor, especially the grieving or dying?
6. Does the death of a donor affect you as an archivist? How so?
7. Does the grief of losing a donor affect the way you make selection and appraisal decisions regarding their collections, negatively or positively?
8. If the loss of a donor negatively affects your judgment as a professional, what would you recommend an archivist do in this situation? Should another archivist consult or step in?
9. Have you ever been the object of anger or blame from the bereaved? If so, how did you handle the situation?
10. Have you found yourself in the position of "grief counselor" when working with a terminally ill or grieving donor? How did you handle this situation on a personal and professional level?
11. What advice do you have for new archivists entering the field, especially when it comes to interacting with donors and their families?

Donor Relations and Education

12. Should archivists have an understanding of grief and the grieving process?
13. Was donor relations, especially regarding grieving and dying donors discussed in your graduate education?

14. Should donor relations be covered more heavily in Graduate School?
15. After being in the field, do you feel that this would have been helpful to you as a new archivist?
16. Do you have any further suggestions about how to incorporate donor relations into graduate education?