

Permission to record and keep

Complete before recording. Give the narrator a copy. Sharing is separately approved on page 19.

This records our agreed working plan. It does not transfer copyright or authorize publication. Check applicable recording rules and any required lodge or repository forms; reconcile conflicts before proceeding.

Interview ID / planned date / lodge

Narrator name or agreed alias / interviewer

People or specific roles allowed to access the source (include deputy and future role-holders only if agreed)

Copy locations and named storage services; who may access each (attach a sheet if needed)

My agreement. I agree to this conversation being recorded and retained, with an index and any agreed transcript, under the access and storage plan above. I may skip questions, pause or stop. No sharing beyond the listed access is approved by this sheet; family copies, events, publication and archive deposit need a separate approval.

Excluded topics / restrictions / review or retention date

Transcription method and service, if any; leave blank to mean not yet agreed

Changes. I may request restrictions or removal through the contact below. The custodian will stop use of the affected material while clarifying the request, document action across controlled copies and explain any limits. Already released copies may not be fully recoverable. See page 20. Silence, death or a date passing does not authorize new sharing.

Custodian / contact method / any agreed practical limits (attach details)

Narrator signature / date

Interviewer signature / date

Both parties retain the same completed agreement and any attachments. Confirm willingness aloud after starting the recording. If the narrator does not understand or agree, do not record; resolve the arrangement first.

The interview log

One per interview. Fill it in before you start the car. File it with the recording and the permission sheet.

Interview ID (page 14)	
Narrator name or agreed alias / birth year only if offered	
Lodge connection / membership years, if applicable	
Interviewer / others present	
Date / place / start and end time / total length	
Recorded on (phone, recorder, microphone) / original file name(s)	
Recording agreement date / allowed access / restrictions; separate release ID if any	
Photographs / papers: owner, copy permission and limits (attach details)	
Names to check spelling / dates to check in the minutes	
People he says to talk to next	
Copies made: 1 _____ 2 _____ 3 _____ (place and date)	
Index written on / by	
Restriction or removal request: file / time range / status (page 20)	

Notes while it is fresh: the story that mattered most, the moment he lit up, what you wish you had asked

Preserve it

Three independent copies, at least one off site, with a custodian who knows where they all are.

The rule

Keep three independent copies and use different storage systems or media where practical, with at least one copy at another location. A computer and USB drive may both use flash storage; their separate failure risks matter more than their labels. One cloud folder or one drive is not a complete backup plan. All locations and services must fit the narrator's agreement.

A workable version for a small lodge

A workable plan: an access-controlled lodge copy, a disconnected backup, and an off-site copy at an agreed location. A cloud service may be one location if disclosed and accepted; a synchronized mirror alone is not an independent backup. Deposit counts only after an archive accepts it under compatible terms. Update the log after each interview or permission change; never restore removed material from an old backup.

The custodian

Assign a custodian and deputy who are authorized on the agreement. Use separate accounts with appropriate access and a documented recovery process; do not circulate a shared password. At handover, transfer approved access, files and restrictions, confirm receipt, and remove access no longer authorized. A successor lodge or archive is not automatically entitled to the recordings.

Once a year

Check new copies when created and schedule a review at least annually. Confirm files open and play, compare the inventory across copies, and test a restore. Checksums can help detect changes. Migrate media when condition, support or reliability requires it; a five-year date alone is neither a guarantee nor a reason to discard a sound sole copy.

Formats

Retain the source format and its metadata. Copying a file without changing it does not degrade audio; lossy re-encoding can. Lossless conversion does not inherently lose audio, but cannot restore detail absent from a compressed source. Ask an archive about preferred formats and create a documented derivative if needed while retaining the source within the agreement.

Copy	Where (place and device / account)	Who has access	Last checked	Next check

Custodian handover	Date	Outgoing (signature)	Incoming (signature)

Within a week, while you remember what he meant. One line per story. Nobody should have to listen to ninety minutes to find the fire.

Interview ID _____ Indexed by _____ Date _____

[illegible]

Brotherhood of Purpose • Robert W. Linn, PM • Revision 2

Approve a specific use

One record per exact version and use. A blank or unsigned record grants no new use.

Read with the recording agreement. The narrator reviews the exact material; approval covers only the version, audience and use written here. Attach required repository or other release forms after resolving conflicts. This is not a copyright transfer or a universal legal release.

Interview ID / release ID / recording-agreement date

Exact file or text version and start/end times; excerpt or whole recording

Audience / named recipient or repository / delivery or publication method

Permitted use and limits: private listening, lodge event, newsletter, online publication, archive access, etc.

Earliest release date, if any / expiry or review date / restrictions traveling with the copy

Decision: approve only the use above / decline / request changes (circle one). I have heard or read this exact version. A date limit delays an approved use; it does not approve another use. After death or inability to review, no new use is approved without a valid documented arrangement and authority.

Narrator signature / date

Reviewer or interviewer signature / date

Other people's rights, privacy and factual checks / unresolved material omitted

Delivered or released by / date / receipt or location / attached terms

Keep signed approval with the restricted master record. Send its applicable use limits with distributed copies, without public signatures or private agreement details. Record the release ID in the log and index. A changed version, audience or use requires another review.

Restrict or remove a passage

Stop use first. Track the request across all controlled copies and related records.

A request overrides routine source retention. Identify the exact file and time range privately. Agree whether access is restricted or content is removed, then record the action without repeating the sensitive story here. Keep unresolved material unavailable. Explain actual technical or legal limits rather than promising complete erasure everywhere.

Interview ID / request ID / request received from and date / custodian

Affected file or text version / start-end times / scope

Requested restriction or removal / agreed action / date / narrator confirmation

Copy / derivative / index	Action and remaining limits	Who / date	Verified

Include source, working files, excerpts, transcripts, indexes, cloud versions/trash, offline backups and any delivered copies. Restrict older backups pending removal and prevent them from restoring withdrawn material. Contact approved recipients where needed; log what they confirm and what remains outside your control.

Replacement version / restricted source location if retained by agreement / approvals updated

Custodian verification / date / narrator informed of outcome and unresolved limits

Retain a minimal change record, not the removed content. Do not silently replace a historical source: label any redacted version and record the edit. If a retention duty or conflicting archive term prevents the agreed action, stop access and seek appropriate guidance; do not claim the request is complete.