West Yorkshire Archive Service

Community Archive Accreditation Scheme

DRAFT

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West Yorkshire Archive Service

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Introduction

In 2009 the West Yorkshire Archive Service (WYAS) received a grant from the Heritage Lottery Fund to undertake a three year long project 'West Yorkshire: Our Stories' aimed at increasing community participation with both the archive service and local heritage and history. One element of this project is the Accreditation Scheme which has been developed to create a benchmark of best practice which groups will be able to work towards at their own pace. It is being run in collaboration with a training programme, also provided by the service, which will offer support to groups involved in the accreditation process.

The scheme has been designed to be as comprehensive as possible and cover all aspects of a community heritage group's anticipated work, from using public spaces to caring for collections. This pack has been broken down into easy to understand sections that can be worked through either in isolation or as part of the scheme as a whole and there is no time limit on the accreditation process.

It is hoped that the introduction of the accreditation scheme will provide a new hub of information for all community heritage groups – whether just starting out or as an established organisation. Participation in the scheme will give groups new confidence in their work, open up new opportunities and hopefully raise standards across the region to ensure that groups can continually increase their capacity and protect the heritage they are collecting.

Accreditation is an important process and will be a learning experience for all groups involved. Whether you are a new group needing advice on how to get going or an established group looking for ways to branch out into new areas, the accreditation scheme will provide both the structure and information sources needed. It will supply both basic guidance and informed assistance from archives professionals on a range of topics that will ensure standards are raised and a level of best practice is established and maintained.

The Accreditation scheme will:

- Create a new hub of information provision for community heritage groups.
- Raise standards across the region.
- Establish a benchmark of best practice.
- Allow for varying levels of participation and acknowledge the variety of work being undertaken by community heritage groups in West Yorkshire.

Aims and Objectives of the Scheme

This Accreditation Scheme has been developed by the West Yorkshire Archive Service to create an information resource hub for community groups as part of the West Yorkshire: Our Stories project. We have recognised that groups often require guidance and advice from the Archive Service, and through the provision of this scheme and of a training programme we hope to ensure that that need will always be met.

Aim
To create an information resource that sets a benchmark for best practice within community heritage groups, raising standards in all core activities of such groups whilst actively promoting sustainability of both practice and collections.

Objectives
- Create a set of basic and achievable standards for the core activities of community heritage groups.
- Create the opportunity for groups to gain a recognisable mark that indicates the high standards they are working to.
- Create usable and accessible information resources that are supported by training provision to ensure groups feel able to complete the Accreditation process.

FAQ’s

Who is this scheme aimed at?
This Accreditation Scheme has been designed with community groups that are working in the area of heritage in mind. This could be an established group with its own archive that has been developed over a number of years or a set of people just starting out and setting up a new group. The information in this pack provides a baseline for basic standards that will need to be met but also has provision for other considerations (**see section 8**) if a group would like to continue with their development.

What can I gain from taking part in the scheme?
The success of the scheme will be partially dependant on participation – the more groups that take part the more recognition the scheme will gain. However, we hope that gaining accreditation will raise both the profile of the group and the standards to which you will be working, which will in turn increase the possibility of securing funding, working in partnership and the likelihood of achieving your aims and goals.

This pack provides a wealth of information about both the basic principles of running groups, such as how to recruit and support volunteers and generate new audiences, and in depth advice from archive professionals about the practical issues that matter to you. By taking part in the Accreditation Scheme you will be giving your group the chance to learn new skills, gain new information and hopefully ensure the successful growth of your activities.

What do we get when we are accredited?
You will receive the WYAS Accreditation Scheme logo to use on all of your promotional material, discounts on training provided by the service, one to one support, regular briefing notes about important and relevant topics and a chance to network with other groups in the region.

How long will accreditation take?
The scheme has been designed so that groups can work through it at their own pace. Each topic has been divided up into sections that can either be worked through in isolation or together as a whole. We are setting no time frame on the accreditation process, and it is entirely up to individual groups how they make use of the material available here.

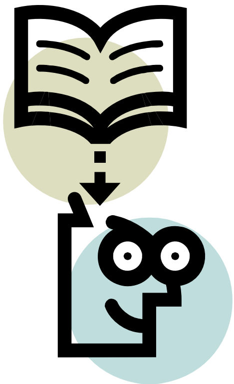
What if we become stuck?
The Accreditation Scheme is a component of a larger area of support provision that the Service has been able to develop through the Heritage Lottery Funded project West Yorkshire: Our Stories. Within this there is the **Network Group** which holds regular meetings for community groups working in the region and also a programme of **Training Sessions**. These sessions have been designed to support key areas of the Accreditation Scheme that groups may find difficult – such as copyright and legislation.

How do we become accredited?
The WYAS scheme is a **self accreditation scheme** – meaning the service will provide groups with all the resources required and the groups must then take it upon themselves to complete the accreditation process.

Each section of this pack contains an Accreditation Checklist at the end which outlines key tasks that your group will have to undertake to complete that section. These checklist points can range from creating a policy document to making sure that an issue is discussed openly with group members. You should endeavour to collect evidence of these activities to be kept safe with your accreditation pack. Each section also contains a range of Action Points designed to help you put the information provided into practice within a group context – these are there to help you and are not a requirement of the completion of the scheme.

Currently there are two types of accreditation. The first is standard Accreditation which excludes section 7. Memory Collection. There is the option however to become achieve Accreditation Plus which will include this section and give groups that have already become accredited something to work towards.

Accreditation Scheme Contents



1. Public Services

Introduction

Some community heritage groups would not consider themselves to have a role in public service. However, the very purpose and aim of these types of groups is to preserve and celebrate the history of the local area and its residents. No matter how much a group interacts with people, the public is vital towards its expansion and longevity.

There are all sorts of ways in which community heritage groups can work with the public – from holding events to inviting people to contact group members with enquiries. All these methods will welcome people into a group, raising its profile and popularity. The public service a group provides is the specialist knowledge of their area, which is invaluable to local and family historians and that can sometimes not be found elsewhere.

However, responsibility is attached to providing any level of public service. The following guidelines will need to be considered by any community heritage group, as there is a duty to take measures to ensure the suitability and safety of premises and situations. Every group will not want to discriminate or dissuade their users from coming to events due to access conditions, which is why issues regarding health and safety will need to be looked at – this may be daunting but entirely worthwhile!

Learning benchmarks

By the end of this section you will:

- Understand the importance of running public events and which will be most suitable (and practical) to organise.
- Know what areas you are responsible for to ensure health and safety and cut down on risks to the public and group members.
- Have considered ways of consulting your service users and putting the results into practice.

Topics

1.1 **Using public spaces**

1.2 **Access and Health & Safety**

1.3 **User consultation**

Resources

1.4 **Accreditation checklist**

1.5

Document templates and examples

1.1 Using public spaces

All community groups need to consider using public spaces as part of their work. Not only will this raise a group's profile, making people and organisations in the local area more aware of your presence, but it will also go towards your long-term sustainability as a result.

Although the purposes of using public spaces will not apply to every community heritage group, there are several main uses that should be considered:

Meetings
Nearly every group will meet together at some point, whether this be on a regular basis or for a specific purpose (e.g. for organising an event), to discuss their activities and future plans. Whilst it is sometimes appropriate to gather in a group member's home, it can be fairer and more suitable to arrange a place for meetings that is central for everyone to get to. This can also help the flow of frequent or regular meetings if each time they take place in a neutral and constant location.

Events
It is highly important to make your local community aware of your group's presence. Holding events or open days in a public space not only invites members of the public to find out who you are but makes the link between your group and the outside world. It will only help to raise your profile if you are publicly promoting the work of your group. This can lead to partnership working with another group or organisation as a result and expand the work that you already carry out.

Exhibitions
Exhibitions may be created to celebrate the completion or launch of a project by a community heritage group. If hard work, effort and time have been spent and something has been produced at the end, it makes sense to promote this publicly – your group should be proud of what they have achieved. Exhibitions can also serve to make links with the wider community. You can stage these events in a public space to mark an important local anniversary, building or tradition.

Drop-in sessions
What better way to raise the profile of your group than to offer your community the benefits of your skills? By running a session in a public space where people can just drop by, you can really show off what your group is about. These sessions may offer anything from local history advice to a series of talks but will welcome members of the public into the remits of your group.

There are a number of factors that your group must consider when planning to use a public space:

- **Cost** – How much will it cost to hire a room or space? Can your group afford this according to your budget? Have you contacted a number of venues and compiled a list of quotes? – **see section 8 'Managing accounts and budgeting' for more information.**
- **Location** – Is it central enough to attract visitors? Is it well known so that people will be able to find your event?
- **Shape and size** – What are you using the public space for? Is it appropriate to your needs? How many people will it hold? Does it have the other features that you want, such as plug points, electrical equipment or refreshment facilities?
- **Access** – Will the public space be accessible to people who consider themselves to have a physical disability or people with pushchairs? Is the space safe enough for an event open to members of the public? Is the space safe enough for members of your group to work in? – **see sections 1.2 Access and Health & Safety for more information.**

ACTION POINT

Your group is considering holding an event locally. Have you…

1. Looked at what is available in your group funds and decided on a budget limit?
2. Drawn up a list of what you will need from the venue in line with your event?
3. Rang around a number of suitable venues, compiled a list of quotes and chosen the best place in terms of price, size and accessibility?
4. Made the venue staff fully aware of what your event is all about?
5. Asked about the practical aspects of the venue, such as wheelchair and pushchair access and fire alarm procedures?

1.2 Access and health and safety

When organising a public event, your group will want to make sure that it is as accessible and safe as possible, so that no one misses out on coming along or getting involved. It will be highly likely that events will be held in venues provided by outside organisations. Whilst this does not give your group a great deal of control, the plus side is that any organisation open to the public has to take responsibility and comply as much as they can with access and Health and Safety regulations.

Access

The venue organisation's responsibilities:

- Public bodies must meet certain standards (where possible) as part of the Disability Discrimination Act 1995. However, this does not apply to private clubs that have a meaningful selection process for members, so your group will need to check the nature of the organisation.
- There should be no physical barriers preventing or making it unreasonably difficult for people to use a service.
- The 'inconvenience, effort, discomfort or loss of dignity' that people may experience must be considered.
- 'Reasonable adjustments' according to the organisation's purpose, size and resources must be made. The practical, financial, disruptive aspects to these adjustments are considered.

Your group's responsibilities:

- Find out about the entrance facilities and access to other floors (e.g. chair lifts, lifts). Consider that if a venue is a listed building, it does not always have to change its structure to comply with the Disability Discrimination Act.
- Change the room set-up as allowed to suit your requirements. These alterations can be as simple as moving tables into a different arrangement or putting a display at a certain height so that movement and visibility are considered.
- Put details of access into any marketing or publicity material about your event, so that members of the public are fully aware of the building or venue.

Health & Safety

In order to cut down the risks of people injuring themselves in public places, there is Health and Safety legislation in place. It is not about creating totally risk-free environments or stifling innovation, but about identifying risks to a person's health and safety and trying to put protection in place against these risks. Whilst the law applies to employers and organisations, there should be things you are doing within your group using common sense when planning and running public events.

The venue organisation's responsibilities:

- Electrical safety – all electrical points and equipment provided by the venue must be properly safety-tested.

- Venue environment – temperature must be 13-30 degrees Celsius, there must be a free flow of air, flooring must not present a physical obstacle or a hazard to slips and trips.
- Facilities – there should be a supply of clean water and toilets.
- First aid – there must be adequate first aid facilities according to the size and purpose of the venue.

Your group's responsibilities:
- Electrical safety – all your own electrical equipment being used should be tested to ensure it is safe (this can be done by an outside specialist) and group members should be properly trained in how to use this equipment.
- Slips and trips – no obstacles are left in the way of where anyone can fall over them (e.g. any electrical wires are out of the way or taped to the floor), sensible footwear is worn by group members when setting up and carrying out an event.
- Moving goods safely – packing-up and unloading is done safely so that group members are not injured (and not by group members who do not feel they are physically able to carry out such tasks), transportation of any material to an event is carried out properly, ensuring proper lifting and carrying procedures are followed (such as manual handling training).
- Refreshments – hot water is labelled with a warning sign, food containing ingredients that some people may be allergic to (e.g. nuts, dairy, wheat etc) is labelled, vegetarian and non-vegetarian food is labelled.
- First aid – your group has a portable first aid kit in case there is not one at the venue, a group member is a properly trained first aider. Try to keep an accident book (especially for group members) so that if anything happens, your group can take steps to prevent it happening again in the future.

Remember that responsibility is two-sided where health and safety is concerned. The group or organisation should be doing what they can to cut down on risks and group members or employees must follow any guidance or training given (whilst using their common sense of course).

Risk assessment
Before you can tackle any potential health and safety risks, your group will need to investigate what these are and how likely they are to happen. This process is called risk assessment.

According to the Health and Safety Executive (HSE), there are five steps to risk assessment:

1. **Identify the hazards** – this means working out the potential ways that a person could get hurt. Walk around any space that you are using, ask the venue organisation if there is anything you need to consider that you may have missed and check instructions of any equipment being used.
2. **Decide who might be harmed and how** – this will usually only apply to members of the public and group members. However, group members may take on specific roles at public events (e.g. setting up, holding a stall) and by looking at the risks to these roles you can decide how best to deal with them.

3. **Evaluate the risks and decide on precautions** – Try and think about how likely something is to happen. Can your group get rid of a hazard? Can your group try to control the hazard? Could you change what is planned to something less risky, prevent access to the hazard, wear suitable clothing or provide facilities to limit the risk (e.g. carry a portable first aid kit)? Obviously, some of these options will be out your hands when using an outside venue, but are useful to consider where your group has control.
4. **Record your findings and implement them** – Risk assessment is all about putting prevention into practice. Write down the results from risk assessments and discuss them within your group. If anything did not go to plan or something can be improved, this can be put into place for your next public event. The more events you organise, the easier and more efficient this will get.
5. **Review your risk assessment and update if necessary** – As time goes by, your group may start to organise different types of public events, use different venues or bring in new equipment. It is a good idea to update your risk assessment process on a regular basis (as often as your group sees fit – it may be once every three months or once a year) to tackle the different hazards that may arise.

To help with the risk assessment process, your group can put together a form to fill in when organising each public event or any outside working **(see section 1.5 Document templates and examples for ideas)**. Remember to document the activity, location, date of initial assessment and who this was done by, any changes from initial assessment (when carrying out a review), the level of risk to a group member, member of the public or property, and what action needs to be taken.

❖ Risk assessment is by no means supposed to take up a large amount of time or effort but is useful in giving your group ideas of what to think about in the process of limiting risks to the public and your members.

1.3 User consultation

Every service that involves members of the public in one way or another (and to any extent) should constantly look at ways of improving the work that they do. Community heritage groups are included in this, as they aim to promote the importance of their local area and people. A great way of doing this is user consultation – asking people what they think of your group and how you can possibly improve. In this way, the people who use your group ('service users') will feel a sense of value that their opinions are used to effect change, your group will evolve in the best way according to your service users and your group profile will rise in your community.

There are a number of different ways of going about user consultation. Your group will need to decide which method is most appropriate for your work (of course, more than one method can be used).

1. **Surveys and questionnaires** – It is a good idea to ask people to fill out a paper form at events (or to pick up at local libraries etc) to tell your group what they think. The idea of paperwork to some people is off-putting, so it is wise to create surveys that are simple yet give users the chance to share their views. For example, it can be a series of questions that people can answer (i.e. Did you find the exhibition interesting?), or a series of statements that people can grade their reaction to on a scale (i.e. 1 is definitely agree, 10 is definitely disagree). Remember to always give people the chance on forms to expand on their answers or go into more detail if they wish to.

2. **Online polls** – If your group has its own website, it is a quick and easy way for service users to give their opinion. This works particularly well when looking at a specific issue – it can be something about an event that has just happened or something your group wants to do in the future but would like to gauge how popular it may be. It can be as simple as posting a question and asking people to click 'yes' or 'no'.

3. **Public meetings** – Why not invite members of the public along to one of your group meetings? If there is something big your group is planning, a substantial change you would like to implement or you would simply like to carry out a regular review, getting people's views and suggestions face-to-face is a good way of introducing yourself to your community and really getting the essence of their opinions.

4. **Compliments/complaints** – Unfortunately, whilst some people will have positive comments to make about your group, there will always be people who are less than satisfied. However, these more negative comments can be really useful as they may highlight something your group may not have

thought of. A comments box with paper slips for people to fill in is enough when using this method of user consultation.

5. **Enquiries** – Invite members of the public to get in touch by putting contact details on any marketing material, such as leaflets, posters and websites. People may want to talk to someone who has expertise about the local area or may have a question about the work of your group. For whatever reason a person gets in touch, it will only help to further raise your group's profile in your local community.

When your group has carried out any form of user consultation, remember to decide beforehand what you are going to do with the results. Try to use them in such a way that shows people that you have listened to their opinions and that their words have resulted in something your group has done or changed.

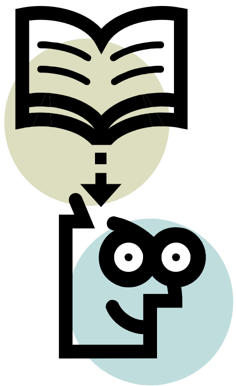
Case Study

- A UK Archive Service created a consultation group in 2007 specifically for the purpose of looking at ways of improving and updating their services. In this case, they did not use members of the public but created a forum of archive professionals to discuss the way in which they work. Like other archive services, they always use visitor surveys, questionnaires for specific issues and a compliments/complaints procedure.
- A UK Council outlines user consultation as a major part of their community engagement policy each year. They use methods such as The Citizens' Panel (a 2,000-strong panel of residents representative by age, gender, ethnicity and ward), Best Value General Survey (a council-wide survey carried out every three years) and Corporate Consultation Groups (forums with representatives from different communities) amongst others to get a realistic picture of how the Council can best serve its residents.

1.4 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Decided upon a suitable type of public event after brainstorming ideas within your group and looking at your available resources	
Decided upon a suitable venue for your event, after researching a number of organisations and obtaining quotes	
Fully assessed the access conditions of a venue (and its facilities)	
Ensured that all group members are confident of their roles within a public event and, those who are able, are aware of manual handling procedures	
Created a risk assessment form and completed it prior to a public event	
Carried out a public event, evaluated its successes and considered what can be improved for next time	
Carried out at least one method of user consultation, evaluated the results and implemented an action or change	



2. Collections

Introduction

You have come together because of a shared interest in collecting or creating an archive rooted in a community that shares a place, heritage or activity.

This section will introduce you to the decisions you need to make in order to administer collections – by taking control of collections you will be able to make use of, and offer access to, their full potential.

The key documentation of any archive service: a collecting policy, accessions register (recording formal acceptance into the collection) and finding aids (catalogues and indexes) are entirely appropriate to collections wherever they are held. By working through this section you will understand how they will make the work you do creating and looking after your collection easier.

Learning benchmarks

By the end of this section you will be able to:

- Establish a collecting policy
- Understand how you will need to record items coming into your collections
- Decide whether and how to digitise collections
- Understand different strategies for providing access to your collections through cataloguing and indexing

Topics

2.1 **How to collect records**

2.2 **How to catalogue collections**

Resources

2.5 **Accreditation checklist**

2.6 **Document templates and examples**

2.1 How to collect records

Establishing a collecting policy is a way of facing up to the realities of what are your available resources and skills and how they match up to your aims. If you do this, you will not disappoint anyone who offers you material that remains unused, avoid the expense of storing and caring for items that are not used, and ensure that treasured items find the right home where they will be appreciated. If you have a document that clearly sets out what can or can't be looked after by your group, mistakes are avoided whereby material that requires special attention is left where it can suffer damage.

A clear statement about your collection may also attract better quality contributions, and attract better quality volunteer, amateur enthusiast and professional support for your project. The more selective you can be, the more you are likely to acquire the level of expertise and knowledge that will make your group in demand as a local or specialist source of information.

Once you have decided what and how you are collecting it is important to set up a system for recording information about items as and when they are deposited – there are practical reasons for this as well as the sense of trust the donor or depositor will have in your group, that their precious record or artefact will be looked after properly.

Writing a collection policy
A collection policy needs to answer the questions

- **Why you are collecting?**

To help preserve the memories and heritage of … a place, a culture, an industry, a shared interest
To create a resource for research into … a place, a culture, an industry, a shared interest
To share online memories of … a place, a culture, an industry, a shared interest

- **What you are collecting?**

Photographs, postcards, maps, printed material, personal papers, and objects – and what will demonstrate their connection with … a place, a culture, an industry, a shared interest?

- **How are you collecting?**

Are you able to store original items, or are you going to scan contributions and keep a digital archive?

- **What can you not collect?**

For example, even the majority of local authority record offices will not accept audio or visual recordings but will refer a potential depositor to a specialist sound or film archive that can offer the correct conditions and variety of equipment to use them. You should not accept items in poor condition, either you will not be able to use them, or if they are, for example, mouldy or infested this could damage the rest of your collection.

If you are offered something that does not fit in with your collecting policy, it is a good idea to have an idea of where to direct someone – perhaps a neighbouring community collection, a local record office, a local studies library? And they will no doubt direct enquirers to you.

The collection policy can be reviewed and changed if your membership or situation changes.

ACTION POINT
How would you improve this statement of collecting aims?

We have been collecting Archives, Photographs, and Postcards from the local area over many years. The aim of the group is to collect or scan as many photographs or pertinent information of the area as possible, as well as to record and transcribe as many historical documents, deeds, wills, etc as can be found.

Recording your collection
It is important to record as much information as possible when an item comes into your collection. This is vital for understanding important additional information about the item, and in keeping clear instructions about how it is to be used that can be clearly communicated in the future.

A useful system may be to have a form that works as a receipt so that you and the person who is leaving records both keep a copy that shows what you have agreed to. There is not always time to have a proper look as bags or boxes arrive – they may contain items that you already hold, or some items may not fit with your collecting policy. Using a receipt you can include instructions for what to do in the event that you do not want to hold onto everything, and only go to the trouble of 'accessioning' (formally accepting) the things that you will definitely keep by adding them to your collections register.

A register of accessions to your collections will include details from your receipt:
- Date received
- Name and address donor/depositor
- Whether the item has been given or loaned or left with you temporarily for copying
- Any conditions, for example, restriction on its use – does it have names of living individuals in?
- Photographs in particular need clear instructions as to copyright
- Do you have permission to digitise and use records?
- What to do in the event that you no longer want to keep the item

And also:
- **A reference number** – if this number is then used to create your catalogue it is always possible to link an item to the original donor or depositor – and avoid any

potentially embarrassing or expensive mistakes if copyright or other conditional use is not observed

- **A location reference** – that indicates where you are physically keeping the item, shelves and other storage locations will have unique reference numbers.

Case Study

In the case of archive collections people who would like to look at items will have access to your catalogues and indexes to look through but not the actual items in your collections for browsing. You will be producing the items they request so that you can supervise these unique records. For this reason, archives do not have to be stored for ease of use by visitors like in a library, but can be stored appropriately for the type of item. For example, you may hold commemorative material of a village celebration, and a visitor may like to see the photographs, poster and booklet. All were deposited together and catalogued as one collection. Ideally, the photographs will have been kept in polyester sleeves within a custom made archival case (along with photos from other collections), the poster will be stored flat in a map drawer and the booklet may be on a shelf with other booklets of a similar size. With their locations recorded you can retrieve them and 're-assemble' the collection for the visitor to view.

Digitising your collections

Creating digital copies of items in your collection may be considered for a variety of reasons. You may not have the safe and secure storage facilities to look after items permanently; someone might want to keep the original item themselves; it may be an item consulted often that may become damaged if repeatedly produced; it may be an item that would benefit from being more widely accessible, perhaps via a community website; a digitised collection may provide images that are readily useful for leaflets, postcards, educational resources, posters, booklets.

Digitisation should not be used instead of looking after the original items properly!

How to manage the digitisation process

Scanning on a flat bed scanner is suitable for paper records, photographs, and slim volumes as long as the spine won't be damaged when you open them flat. A digital camera can be used for items that are too large for the scanner or are too fragile or difficult to place flat.

Digital files are difficult to look after and keep safe from alteration, or even find again if they have not been named systematically. Therefore more planning and collecting decisions than usual have to be made before you begin to scan or photograph – if you don't either it will be too late, if the record is no longer available, or you will have to undertake a wasteful duplication or multiplication of digitisation effort. You also want the quality of your scans or photographs to be consistent and reliable.

Choosing batches to work on of similar items, you will become familiar with the processes of digitising and recording the output easier.

- **Each digital file will need a unique number**, this could be its catalogue number with _01 added for each scan made (the 3 sheets of paper that make up a letter could be abc_123_01, 02 and 03 with _2 if the sheet has been written on both sides, so abc_123_02_2 is the reverse side of the second sheet)

You also need to record who made the scan, when it was done, the size of the original width by height in centimetres, the size in megabytes of the master 300dpi TIFF version (this is the one that will be backed up for permanent preservation) from which other copies will be made. You should also record in this document when copies are made, their size and their format. You will also record where the images are saved. Other details about the digital file are captured automatically and embedded (Adobe Bridge with Photoshop can be used to manage this). This technical metadata will be needed to identify and interpret the digital file in the future.

ACTION POINT
Consider the best way of reassuring your researcher that you have included all of the document or photo (Answer: crop the scan with a border zone approx 1 cm of the surface behind the scanned item)

Should you scan blank leaves in a pamphlet? (Yes – convention numbers right hand pages with odd numbers – it is easier to keep scan numbers matching page numbers – and easier if you need to produce a surrogate copy to assemble the pages as the original.)

You should now consider creating a workflow document to help with the digitisation process.

2.2 How to catalogue collections

Where to start
If we try to group records together that belonged together as and when they accumulated, in the future it will be easy to understand where they came from, who created them and why - interesting and important information that might otherwise be lost for good.

For example, if we are given some photographs that Bill Brown took of parks and fungi and separate them into 'photos of parks' and 'photos of fungi' and then someone assumes there is a collection of photographs of parks and helpfully adds more pictures of parks to it, there is every chance there will be confusion about who took which photographs. But if we always keep them in the context of Bill Brown, who not only was a member of the Berry Bottoms Naturalists' Society but also Superintendant of Parks for the local council, this will help future users understand the pictures, and may point them towards further information. The Berry Bottoms Naturalists' Society records may include minutes or reports if a fungi survey was carried out, and local authority records may have files describing work that was going on in local parks and help date these photographs (and others like them).

Grouping items by provenance
When we group records together like this we only need to provide certain information once, rather than repeat it. This works if every time we describe the contents of a section we only add information that applies to ***all*** the records we have grouped together.

*How about calling the **COLLECTION** …*

BBR Bill Brown, photographs *There are only photographs taken by Bill Brown here*

And explaining that …

Bill Brown (1903 – 1976) was a local naturalist and member of the Berry Bottoms Naturalists Society and after training at Technical College went on to become Superintendant of Parks for Happy Valley Urban District Council in the 1950s until his death in 1976.
(We were lucky enough that his son gave us the photographs and could fill us in on the details).

*The collection divides into two clear **SERIES** (and there is no need to mention Bill Brown again)*

BBR/1 Photographs of Happy Valley parks *noting that there are 6 items, all black and white*

BBR/2 Photographs of fungi at Berry Bottoms *noting that there are 6* ***ITEMS****, all of them in colour*

If we have time, or if there is interest in the particular parks that he photographed we can then narrow it down ...

BBR/1/1 Bluebell park
BBR/1/2 Bluebell park bandstand
BBR/1/3 Centenary park
BBR/1/4 Victoria park *noting that there is a date on the back of this photo 1965*
BBR/1/5 Albert park
BBR/1/6 Albert park boating lake

Each item then has its own number, so that we can find it, account for it if we borrow it and replace it. It also tells us (working backwards) that, for example, number 6 Albert park boating lake belongs with other photographs of Happy Valley parks and belonged to Bill Brown.
If Bill Brown labelled the individual photos with dates as well as names we can add this information, if he didn't we can make a good guess – we know when he worked for Happy Valley and that they are black and white – but we need to show this is a guess rather than obtained from the record, so [1960s] rather than 1965.

If more of Bill Brown's photographs are found these can easily be added to an existing section using the next available number. So a photograph of Victoria park in the snow would be BBR/1/7 or a new series of photographs of roses would be BBR/3.

It is easy to design a list and stagger the information to show how the levels (collection, sections, series, items) work together.

BBR BILL BROWN, PHOTOGRAPHS
Bill Brown (1903 – 1976) was a local naturalist and member of the Berry Bottoms Naturalists Society and after training at Technical College went on to become Superintendant of Parks for Happy Valley Urban District Council in the 1950s until his death in 1976.

BBR/1 Photographs of Happy Valley parks

BBR/1/1 Bluebell park
BBR/1/2 Bluebell park bandstand
BBR/1/3 Centenary park
BBR/1/4 Victoria park
BBR/1/5 Albert park
BBR/1/6 Albert park boating lake

BBR/2 Photographs of fungi at Berry Bottoms

Using spreadsheets
But it is even more useful if the listing is compiled in a spreadsheet, it saves on typing because you can quickly generate consecutive numbers and it makes it easy to sort and add information. You can control how data is entered by format or by restricting terms that can be added. The column headings will be easily recognisable to staff working in archives services and they are all that is needed for a catalogue to comply with international standards. In the future, *if* the collection is cared for in an archive the information can be quickly and accurately added to their database - and our cataloguing work will continue to be of huge value.

What if?

We still think it is more useful at the moment to collect together records by subject.
A problem with this approach, especially with photographs, is that a photo that one person might say it is a photo of a park, another person might say is a photo of a bandstand, another person might say is a photo of Berry Bottoms Brass Band – and they are all the same photo BBR/1/2.
The best way to make collections work is to add subject keywords to the list such as 'parks' or 'brass bands' so that a search for 'parks' will indicate all parks-related records just as if they had been collected together but without losing track of where they originally belonged.
This works well as long as we all agree on the exact term that will find the records we need, and it could be a subject, or place name, or person's name.

Our collection has been sorted by subject for a long time and we don't really have good enough records to work out where they came from, what can we do?
If you keep the subject groups as broad as possible so as to avoid the problems of two indexers describing items in different ways and cross reference where necessary you can construct a catalogue on the same basis as a provenance based catalogue.
So, for example, you may have the
Happy Valley
Business/Family/Religious/Education/Transport/Political
Organisations/Charities/Military
Collection
and could identify them as HVB, HVF, etc

If you have ever created narrower subject headings you may have to reallocate these as subject indexing terms. For example, a local resident's ration book formerly kept under 'Second World War material' would be better listed with families since that is what makes it unique. Both its date and a subject term, will allow you to quickly create a list of all the material you hold relating to the Second World War if required.

You will need to work out how you are consistently going to refer to people's names, place names, business names, subject terms and control this carefully if searches are going to be successful!

Our group has collected a variety of photographs from different people as part of an event or project, surely we can't be expected to set up collections for every one?
Because they were collected together at the 'Party in the Park' community event this is part of the story of how they accumulated, so they become the **PPM Party in the Park Memories photograph collection** and can be listed together.

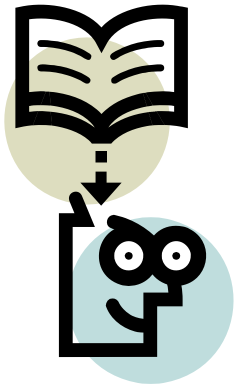
Are there other ways of naming the collections, might the letters repeat and become confusing?
Another way is to give your community archive three letters and then use numbers that run on as you add more collections. So the Berry Bottoms community archive group could give us BBA1, BBA2, BBA3 and so on.

We have some photographs and maps is there anything else we need to record about them as we catalogue?
It is useful to record the physical size of these items (width by height in centimetres), especially with larger maps (also are they folded or rolled?). This will tell you the space you need to open it out and look at it. Also details of interest to potential users that relate to these specific formats – is the photograph in black and white or colour? What scale is the map – this will indicate whether it will show a required detail? Is the map printed or hand drawn? – who drew it? – this will matter for copyright. Has the map been annotated – certain areas shaded or marked and why was this done? Have the photographs been annotated on the reverse with captions relating to the content? All of this information can be incorporated into the description field or dimensions can be listed in another column 'physical description'.

2.3 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Create a collecting policy	
Produce a receipt for deposited or donated records	
Create and maintain an accessions register	
Ensure that cataloguing guidelines available	
Digitisation activity only – create a workflow spreadsheet	



3. Caring for collections

Introduction

Without wanting to discourage the enthusiasm with which collections are created, planning for the time, processes and material needed to ensure their survival is vital – and it is important to consider this from the beginning. What you are creating is unique and irreplaceable, and the historical value of your collection will increase over time, as long as the information and evidence it contains can be successfully preserved. Conservation decisions that are made at the beginning will determine how long this is.

Archive repositories, such as local authority record offices, have storage facilities and procedures that conform to national standards. This part of the accreditation scheme will guide you towards achieving appropriate care for your collections whilst balancing best practice and available resources.

You will need to consider: the conditions your archive collection is stored in; the quality of the packaging; and secure, sensible and safe handling. All contribute to prevent deterioration or eventual loss. Where damage or disaster does occur, it will be necessary to recognise it and act quickly, and know where to go for specialist help. Digital records, such as scanned images and digital photographs require particularly rigorous advance planning.

It is also useful to remember that you have recorded how the records belonged together in your catalogue and given them a unique reference number to locate them – there is no need to store them in the same order, they can be stored and handled differently according to the type of record.

Learning benchmarks

By the end of this section you will be able to:

- Assess and improve the quality of your storage, packaging and handling of archives
- Understand the issues and how to adapt solutions to the problems of creating and storing digital records for the long term

Topics

3.1 Storage conditions

3.2 Packaging and choice of materials

3.3 Secure, sensible and safe handling

3.4 Dealing with damage and disaster

3.5 Looking after digital records

Resources

3.6 Accreditation checklist

3.7 Document templates and examples

3.1 Storage conditions

Your collection will need to be protected from theft, fire and flood in secure premises protected by burglar and smoke alarms. Apart from these extreme occurrences your collection also needs to be protected from heat, damp and dirt all of which allow insects, rodents, fungi and mould to thrive, and all of which pose a serious threat to paper records.

Ideal conditions for paper records are a temperature between 13 and 19 degrees centigrade and a relative humidity of between 55 and 60% - a warmer stable temperature is better than frequently moving documents that are looked at a lot from cold to warm though.

This means a room that feels regularly cool to you, where the air feels fresh and clean, so a room in the house or building with background heating where fluctuations of temperature can be avoided. Also avoid attics and basements, the floor, heating and water pipes, outside walls, direct sunlight, radiators and house-plants!

Before wrapping or boxing new items remove surface dirt or dust with a soft brush such as a natural bristle shaving brush. The aim is to avoid smearing, another idea to trap dirt is to use pieces of a microfibre duster – smaller pieces are easier to direct dabbing carefully in one direction and discard as soon as they appear grubby.

ACTION POINT
Check the environment where your collection is stored at regular intervals using thermometer and hygrometer. Keep a log of this. [Digital LCD Temperature and Humidity Meter Clock Alarm costing under £10 on amazon] They need to be calibrated correctly, it might be easier to buy a new one annually.

ACTION POINT
If relative humidity regularly exceeds 60% or there are large fluctuations in temperature consider finding a better store for your collection or take remedial action. Consider running a dehumidifier or thermostat controlled portable heater, or improve ventilation. If the collection is kept in an enclosed space such as a small room, cupboard or safe, consider introducing moisture trap crystals,

3.2 Packaging and choice of materials

What to use
Archive material needs packaging and boxing to prevent damage and loss.
A poor choice of packaging can cause deterioration from staining or fading to disintegration.

- **Ideal choices**

Paper and folders should be 'archival' 'acid free' 'lignin free' – these are now more widely available with the growth in popularity of 'crafting' and 'scrapbooking'
Storage boxes should be 'archival' 'acid free'.
Ink (used to create records not mark existing records) should be 'archival' – usually waterproof, permanent and black.
Electronic records should be laser printed on archival paper.
Documents should be fastened together using brass paperclips, over a slip of archival paper to protect the document if necessary, or unbleached cotton tape.
Photographs should be inserted in polypropylene sleeves.

- **Fund saving solutions**

Storage boxes that are not of archival quality can be lined with acid free paper

- **Avoid at all costs**

Sellotape
Laminating
Adhesive photograph albums
Poor quality scrap books
PVC used to manufacture 'clear plastic wallets' or 'punched pocket' filing storage
Over-filled boxes 'cramming'
Metal fastenings that can rust
Rubber bands

ACTION POINT
Survey records already in your possession. Prioritise packaging improvements, identify documents over 50 years old, photographs and your most precious items. Identify improvements according to the availability of time or funds. Use this survey to rank tasks by urgency and feasibility.

3.3 Secure, sensible and safe handling

Your collection also needs protecting from humans! (Yourself and others.)

It is best practice to have a system in place where you know where items are at all times. You could use cloakroom tickets (one stays with the item, one in the place in the store where it belongs) and a log (ticket number, user name, item number, location) or a small triplicate book (one copy stays in the book, top copy on the shelf, another copy with the item) to link a record being consulted with who is using it, and where you can find and replace it. When the cloakroom tickets/copies are reunited you can initial that the document has been returned, and check at the end of the session that there are no outstanding items.

Follow basic rules whenever archives are being worked with or consulted.

- Make sure your hands are clean and dry.
- Use pencil to make notes.
- Never eat, drink or smoke on or near a table where there are archival documents.
- Do not run your fingers over or lean on the document.
- Avoid excessive handling
- Open up folded documents and store them flat, repeated opening and closing causes damage along the fold.
- Remove documents from envelopes, repeated insertion and removal will cause damage.
- If a document is consulted often, or is suffering wear and tear, consider making a copy (photocopy or scan)

ACTION POINT
Create a sign to display in any location where archives are likely to be produced as a reminder. Consider any other guidance that might be appropriate for your collection. For example, if you are inspecting photographs, hold them by the edges or use cotton gloves.

If you need to make a repair, ask for advice from the conservation service of your local record office, they will probably charge to carry out the work (and professional conservation is the best option) but will certainly advise on materials and processes that are feasible for you to carry out.
Insert a fragile item into a polyester pocket to keep pieces together, prevent deterioration, allow it to be handled and consulted.

Sound packaging and storage will help prevent damage from water and smoke in the event of a disaster such as a flood or fire. For example, boxes with properly fitted lids offer a good level of protection, as does raising the lowest level of a shelf on which they are stored 6 inches off the floor.

You will need specialist help and guidance in dealing with other kinds of damage such as insect infestation or mould. This will not necessarily cost money! Your local record office may help identify the insect involved, and recommend deep freezing in sealed plastic bags for a particular time and temperature that you can achieve at home. But you should also be aware that, mould spores, for example, can be dangerous to health and cleaning will require specialist equipment.

ACTION POINT
Contact your local archive office or other local repository and ask who can be contacted for advice in the event of disaster. Record and circulate details and check this is up-to-date once a year.

Case Study

Clothes moth larvae in a community collection

'We noticed three small leather bound notebooks with raggedy holes in the spine, when we opened them stitching holding the pages in had come loose and we could see hard fine dirt and threads like fine cobwebs. We described the problem in an email to the conservator at the county record office, she advised us to isolate them from the rest of the collection. We sealed them in plastic bags until we could take them to her. On inspection she identified them as being infested with clothes moth larvae, and found one of the small creamy coloured grubs. She recommended using bristle brushes to clean in between all the pages and in the spine then freezing to kill off any remaining eggs. One of our members had room in his freezer that had a digital display that could show a constant temperature of -22 degrees. The three volumes were put in thick polythene bags and tightly sealed with strong tape with the air squeezed out to prevent condensation – so the rest of the contents of the freezer were quite safe! They were left in there for a week and left packed until they gradually returned to room temperature. The volumes were unharmed. We kept them boxed separately for another few months until we were sure we could see no evidence of any more damage.'

The table explains how to create and care for a collection of scanned or photographed digital images with the steps to follow and why, ideal and next best solutions, with some examples.

Action – and why?	How - ideal solution [next best]	Example
Select digital images to keep for a long time - there is time, effort and money involved in storage	Rate their importance. Consider quality in terms of content, composition, sharpness. Keep version with largest file size.	
Save in stable, standard format and resolution suitable for preservation • keep the best permanent version from which other versions can be created for other purposes such as web display or email	TIFF 300dpi 8 bit (black and white) 24 bit (colour) [JPEG] **NOT** RAW this is specific to brands of digital camera software	
Give each image a unique file name that describes its place in the collection well • so that you can find it • so that you can keep information about it	Use lower case letters and/or numbers, the dot, and three letters that represent format as usual. [If you need to use a space represent this with an underscore, do not use the space bar]	2010p001.tif first photograph kept from 2010 bbr00234.tif 234th photograph kept that was taken from the Bill Brown collection bbr_0234.tif
Tag photos with names of people, places and subjects that describe the content, just as you might formerly have captioned physical photographs on the back or in the album • photos of the same subject can be found quickly • a photo that is of a duck pond to one person may be a photo of a bandstand to another – both will be able to find the same image	Open source tagging software 'attaches' labels to the metadata of digital images	myphotoindex.com fototagger.com Freeware Itagsoftware.com Windows/iPhoto on Mac image organisation/editing software has tagging geotagging using Google earth placemarks
Sort images into folders and directory as necessary, compile a brief description of the contents.	Spreadsheet inventory and log Directory structure saved and printed on archival paper http://www.karenware.com/powertools/ptdirprn.asp	Includes file name, format, contents, can include copyright instructions, dates and dates of transfer.
Make copies of images on	Quality CD/DVD that come in	External portable hard drives

separate media, and store in different locations. Keep printed inventory with other important papers. • High concentration of digital images, at risk of total loss of collection in event of loss of computer, disc etc	individual cases **and** external hard drive **and** online storage in the 'cloud'. Do not zip or compress. Burn to CD/DVD not at maximum speed and aim to copy across to fill in one session. Agree to any option to verify.	500MB to 1TB cost £50 - £60 in 2010. Online storage possibilities mozy.com flickr.com dropbox.com
Check images can still be read • Over time printed photos may deteriorate, for example, they may appear faded in the future but can still be looked at. A change in technology that makes equipment to read CDs obsolete, for example, makes the images stored on them uninterpretable • damage and deterioration is not visible so action must be pre-emptive.	Activate external hard drive once a month Check CD/DVD once a year Create new media copies every five years or when necessary	

ACTION POINT
What other kinds of digital files do you need to keep safe? Create a table of solutions for any other digital records that you look after, for example, emails or digital sound files. The copying and storing process applies to all digital records. You need to be aware of the latest advice for recommended formats for your kind of collection – and that technology changes often.

You should also research best advice for storing and handling CDs and DVDs.

Case Study

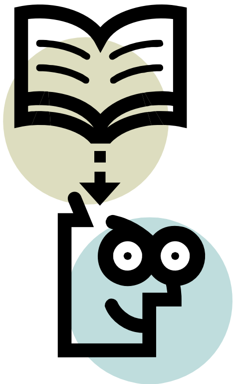
Digital storage

'I keep a portable external hard drive next to the computer where I upload digital photographs and do the scanning and back up ‘preservation master’ folders whenever they have been added to. I keep a second portable external hard drive locked in a safe in the secure business premises of one of our members. At our monthly meetings we exchange external hard drives. That way they are routinely activated monthly, and the worst that can happen is that we lose one month's changes.'

3.6 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Conduct environmental monitoring	
Undertake a records survey	
Ensure that handling guidelines are on display and users asked to read and conform to these by signing visitors' book	
Contact made with local record office to ask for contact in case of disaster	
For digital collections only: Three means of digital storage identified and use planned for	



4. Legislation

Introduction

There are two areas of legislation that have significant implications for community heritage groups.

Data protection is concerned with ensuring that information held about living individuals is kept and used appropriately, and covers both how you look after your own members' details and the information that is held within archive collections.

Your collections will also inevitably contain items protected by copyright, and this has important implications as to whether you should make copies or digitise items for publication or inclusion on websites.

Both are complex areas and potentially problematic, and if disregarded can have serious consequences thereby damaging a group's reputation. For this reason, this part of the accreditation scheme is the only one that requires participation in formal training, offered by the West Yorkshire Archive Service.

Learning benchmarks

By the end of this section you will:

- Understand your obligations regarding data protection for your own members, contact details and material held in collections
- Decide whether copyright exists, who it belongs to and for how long
- Understand how to administer your collections to comply with the letter and spirit of copyright law

Topics

4.1 Data protection

4.2 Copyright

Resources

4.3 Accreditation checklist

4.4 Document templates and examples

4.1 Data protection

The Data Protection Act was passed in 1998 and exists to give people certain rights regarding information held about them. It protects these rights in respect of the processing of a person's personal data – processing includes the obtaining, recording, holding, altering and destruction of data.

Data protection legislation particularly serves to protect the disclosure of 'sensitive' personal information. This can include data that gives the following details about a person:

- Their racial or ethnic origin
- Their political opinions
- Their religious (or similar) beliefs
- Their physical or mental health
- Their sexual life
- Their membership of a Trade Union
- Their alleged criminal offences and the court proceedings for any (alleged) offences

This means that records containing sensitive personal information must not be made available to the public for a certain number of years to protect others.

Time scales

- Under Data protection, **a life span is deemed to be 100 years** so if a person in a record will be over 100 in the current year, the information in it can be made available.
- However, sometimes it is not clear how old a person may be. In this case, Data protection states that information can be made available after **84 years for adults**, **98 years for children** and **100 years for infants and babies**.

NB Any records that are referred to from this point forward are only records that contain sensitive personal data, and so are included in Data protection.

Case Study

At the West Yorkshire Archive Service, many of the records that we hold give sensitive personal details about a large number of people. We have to be extremely careful when providing access to these records in our searchrooms. Here are some examples of the collections that raise Data protection issues (although we deal with each request for a record on an individual basis):

- Court registers that document a person's alleged criminal offence
- Hospital admission records that state a person's medical condition, along with their ethnicity and religion plus other details
- School admission registers that give a pupil's home address
- Special schools that identify a pupil's medical or personal situation – for example, this could cover schools for blind children or orphanages
- Coroners' report books that give the nature of a person's death – sometimes under unusual or extraordinary circumstances.

There are eight principles of Data protection:

1. Personal information must be processed (this could include obtaining, recording, holding, altering or destroying) fairly and lawfully – **Your group must obtain records within the law and deal with them fairly. For example, if a person deposits records with you or you record a person's oral history, you cannot change it, make it publicly available or destroy it without their permission.**
2. Personal information must be obtained only for specified and lawful purposes – **Records that fall under Data protection and are in the care of your group will be obtained for the purposes of local history research and preservation.**
3. Personal information must be adequate, relevant and not excessive according to its purpose(s) – **It is unlikely that this point will cause any issues, as the records of your group will be kept for historical and research purposes and will not be excessive in nature or irrelevant to your holdings (i.e. will relate to your local area or to the purpose of your group).**
4. Personal information must be accurate and (if possible) kept up to date – **It is highly unlikely that your group will need to keep records up to date, as they are archives and created as unique and original. However, it may be worth making a note of accuracy where there may be false accusations made against a person in a record.**
5. Personal information must be held for no longer than necessary – **Since your group will hold records for historical and research purposes, this point need not apply as you have reasons for keeping them.**
6. Personal information must be processed (obtained, recorded, held, altered or destroyed) in line with the rights of Data protection – **See point number one.**
7. Personal information must be kept safely and securely – **Make sure that any paper records are monitored by a group member or locked in a safe place. Make sure that any electronic records are kept in two formats (e.g. computer file and print out or CD) and stored in a computer system that has anti-virus software installed on it.**
8. Personal information must only be transferred outside of the European Economic Area where there are adequate levels of protection – **This will usually only apply to sending information overseas via e-mail, post or telephone if your group receives an enquiry. There is not a high risk on the information here as telephone is not a problem, and e-mail and post are subject to measures of security.**

There are exemptions that occur within Data protection, where it is acceptable to make sensitive personal information available:

- The information is being used as part of statistical or historical research but not to support measures with particular people or where it will cause damage or distress.
- Disclosure of the information is required by law or in legal proceedings.
- It is being used to safeguard national security or in the prevention of crime.

The main question your group should ask when deciding whether to disclose sensitive personal information: **Will it potentially cause damage or distress to another living person?**

Data protection of contact details

Sometimes your group will acquire a person's current contact details – from your own members, at events, for mailing lists, in permission forms etc. These contact details need to be protected as much as sensitive personal information in records. On any forms in which you are asking for these contact details, put in a sentence about how this information will not be shared with any third parties. If this information does need to be shared, state the names of the group or organisation and get permission from each person (by a tick box).

ACTION POINT

Think about the following enquiry from a member of the public and how you would deal with it as a group:

I am a university History student and I am carrying out research for my dissertation. I have found out that you hold the diary of a nurse who worked in a children's hospital during the 1930s and wrote about her time there. I was wondering whether I could visit your group and view the diary to use her experiences to write generally about children's hospitals in the area.

How would you respond?
What factors do you need to bear in mind?
Does it make a difference if the person was not a student but a journalist?

ACTION POINT

Think about the following situation and how you would deal with it as a group:

Your group is carrying out an oral history project on your local area. You come to interview a neighbour and in their recording they state that a person (they give their full name) in the area committed a crime in the 1960s and was not caught for it.

What does your group do with the recording?
What does your group do about the information in the recording?

4.2 Copyright

Please note: This guidance is not intended to be used as legal advice. It is an introduction to the concepts involved in copyright law. Iit is always recommended to consult a specialist copyright expert for any specific problem.

What is copyright?
Copyright is the right to copy, and ***only*** the owner of the copyright has this right. Copying can mean to issue copies, rent or lend, perform, show, play, communicate (putting an image on a website is considered as communicating to the public by electronic means) or adapt.

- Copyright protects original ideas that needed skill, judgment or work that have been fixed by writing them down, by photography, by drawing or painting them, by recording them.
- Copyright is automatic it does not have to be registered.
- The owner of the copyright is usually the creator, so the author, letter writer, photographer, artist. Although between 1912 and 1989 the owner of copyright in a photograph is the owner of the material on which it was taken (usually the negative).
- You can only copy or use a work with the copyright owner's permission
- Copyright protects certain kinds of intellectual property; as property it can be sold, transferred, gifted, licensed, and bequeathed. Just because an item is in your collection this does not mean that copyright is also owned by you, rather copyright must be explicitly passed to you.
- Copyright protects literary works – sounds like quality novels but is anything written and includes letters, emails, articles, diaries ...
- Copyright protects artistic works – sounds like paintings but includes photographs, drawings, plans, diagrams, and maps
- Copyright protects recordings of work as sound or film.

Copyright in the UK is governed by the Copyright, Designs and Patents Act 1988, as amended often to conform with directives of the European Union. Older material is still affected by earlier legislation, the Copyright Acts 1911 and 1956.

How long does copyright last?
For literary and artistic works copyright lasts for the life of the author or creator and a further 70 years. For sound recordings copyright lasts 50 complete years after the date of creation.
Any literary work that was unpublished on 1st August 1989 (perhaps a letter or diary in your collection) whose author died before 1st January 1969 is in copyright until 31st December 2039. But to balance public access for the benefit of the cultural life of society generally with the rights of long dead authors, if the item has been open to public inspection, not previously published and is over 100 years old by an author

who has been dead for more than 50 years, these older unpublished literary works can be copied.

What about newspaper cuttings that form part of collections?
Anonymous articles can be considered out of copyright 70 years after publication. If the author is named in a byline copyright lasts for 70 years from the author's death, the ownership of copyright will depend on whether the author was employed by the publication, freelance or syndicated.

What is fair dealing?
Although fair dealing is applied in the context of library and archives copying rules, it is a useful concept to understand how copyright works in the real world.
The concept of what is fair is not strictly defined, but if you follow the principle that anything you do should not harm the copyright owner and that no one should lose by your actions, it can be said that copyright has been dealt with fairly. This can be done, for example, by following closely any instructions as to how you have been told to acknowledge sources using exact wording. You can also make it clear that you will not make or publish copies of material that is still in print or commercially available, thereby demonstrating that you have not made a copy rather than bought one. The researching public can benefit from access to a copy, but no one should benefit commercially.

What about the copies archives and libraries make?
Only libraries and archive services can provide one copy for private study, never commercial research, of unpublished works in copyright, and they cannot copy artistic works such as plans, maps or photographs.

Case Study

You have been given a family album of black and white and colour photographs. The donor has indicated which photographs were taken by which family members and given dates where possible. Some of the early colour photos look like they were taken by friends of the family in the late 1960s. Some of the colour photos are her school class photographs taken in the 1970s. The donor is happy for the album to be digitised and appear online.
In 2010 a photographer must be known to have died before 1940 for any photographs they took to be out of copyright. If the photographer is unknown the photograph must have been taken before 1940 to be out of copyright.
Some black and white photographs taken in the 1920s are out of copyright because either the donor's great grandfather, a keen amateur photographer, took them and he died in 1935, or the photographer is unknown.
The donor can sign a copyright release form for any photographs taken by herself and her parents after 1940. It is unlikely that copyright owners for the family snaps from the 1960s will claim their copyright. The school class photographs should not be copied unless permission is requested and granted by the professional photographers who took them and the source acknowledged. You should also consider the privacy of other individuals pictured.

ACTION POINT

Consider how you assure visitors that your group takes its responsibilities regarding copyright seriously and compose an acknowledgement or disclaimer that explains your position. For example:

"We are grateful to anyone who has taken photographs appearing on this web site but who could not be traced despite our best efforts, and are therefore unacknowledged. Any copyright holder wishing to query material on the web site is invited to contact us. We will be happy to remove any material if requested to do so by the copyright holder. If you appear in an image and are not happy to appear on the site, please contact us and we will remove the relevant image." or "We take the protection of copyright very seriously. However our Archive has been built up over many years by various individuals and unfortunately the origin of some items is uncertain. While in many cases the copyright of the source material will have expired in other cases the owner of the copyright is not known. If any item displayed within this section of our website breaches any individual's copyright, please contact us and we will either remove the offending item immediately or provide a copyright release form to formalise the use of the item."

Copyright release

If you plan to make copies or publish items from your collection in print or on a website, or if you collect by making copies, that is, digitising, items that are loaned to you, a copyright release form will be the way you demonstrate that you have the authority to do this. The author and copyright owner also have moral rights that remain, even if copyright is released, and this is their assurance that the work will not be substantially altered (for example, a photograph is cropped or a diary is edited) such that it can be misinterpreted.

The form needs to indicate who the item and copyright belongs to (this might not be the same person), and that this person understands how any copy is going to be used and circulated.

ACTION POINT

You should now spend some time with other members of your group and create a copyright release form that is appropriate for your community archive group's collection. You will need to consider the types of items you

Protecting your and others' copyright

There are two good ways of protecting any material that you put on the internet, both rely on the quality of the image that will restrict any further reproduction:

either embed images with a digital watermark or at the very least make sure the version of the image for the internet is 72dpi and restricted to 640 x 480 pixels.

The use of Creative Commons licenses are a way of acknowledging that inevitably material on the internet is going to be downloaded and shared, but asserts in what ways you are prepared for it to be used. You may have seen it used on flickr. It may in fact be good publicity demonstrating an enterprising outward-looking collaborative group if material you have created appears on other community websites and is attributed to you.

4.3 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Attended half-day legislation training course by WYAS	
Created copyright release form if necessary	

4.4 TEMPLATE

Copyright Release Form

ITEM REFERENCE NUMBER

Community Archive

I confirm that any photographs, documents or recordings submitted to the Community Archive belong to me.

I confirm that to the best of my knowledge, I own the copyright to the photographs, documents or recordings submitted.

I give permission for my photographs, documents and recordings to be copied into the Community Archive and agree to their use for not-for-profit purposes, including:

Public reference
Educational use
As a source that may be published (including CD-ROM and the Internet)
In public performance

I agree to the inclusion of my name and address in any register required by the Data Protection Act 1998.

Name …………………………………………………………..

Signed …………………………………………………………..
Date …………………………………………………………..
Address …………………………………………………………..
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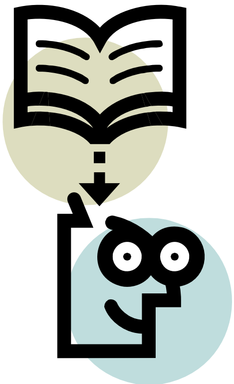


5. Members and Volunteers

Introduction

Training and learning are important to any group that wants to support its members and ensure its development and growth. Investment in training and learning will help your group to stay up to date, learn new applicable skills and make your members and volunteers feel valued – hopefully ensuring their commitment to your activities.

Training and learning can be both **formal** and **informal**. Each group will have their own ways of working and it will be important that new members and volunteers are able to contribute to the group in the right way. An introduction to meetings times, group structure etc. would be an example of informal training. If there are new activities that a group would like to undertake but members do not have the specific skills required (for example recording oral histories) then it will be useful for either the whole group or selected members to undertake formal training so they can apply these skills and keep up a good standard of practice.

Community heritage groups are not static entities, they are busy and changing all the time. These groups exist to preserve important information about a locality, location or community through collecting and learning. The best way to support this atmosphere is by placing learning and training at the heart of your group's activities so you can continue to grow and reach out to new people.

Learning benchmarks

By the end of this section you will:

- Understand how training underpins the development of your group
- Know where to look for training opportunities and what training is needed for whom.
- Know practical steps that you can actively take to raise your group's profile.

Topics

5.1 How to recruit new members

5.2 How to recruit volunteers

5.3 Recruiting and making use of volunteers

5.4 Talking to educational Institutions

Resources

5.5 Accreditation checklist

5.6 Document templates and examples

5.1 How to recruit new members

It is important for the sustainability and growth of community heritage groups to involve as many people as possible. By increasing the number of members in your group you will be more equipped to achieve your goals and aims and can become more involved with your surrounding community. When working with and in communities one of the most powerful tools that you will have (which is free!) is 'Word of Mouth'. The more people that are involved in your activities the more people will know and talk about it. Therefore going out into the community to find new members will ensure your group is able to build up a presence and capitalise on this free advertising tool.

Groups come in many different shapes and sizes but making sure you have a policy in place for how to ensure you can recruit new members, and what to do when someone wants to join your group, will make the process easier.

Where to start

You should begin by looking at the members already in your group. Do they know somebody that would like to be involved but is maybe waiting to be asked? Are there members of the community that you are working with that you think would like to become involved? Are there people with specific skills that you think should be involved? Are there parts of the community that aren't represented in your group that you think should be, for example young people?

You should set yourselves some loose goals in terms of the number of people you would like to recruit by the end of the year and perhaps delegate a particular number of weeks a year that you dedicate to finding new members.

ACTION POINT

People will be interested in the group if they are interested in your activities and aims. Sometimes these can be hard to explain if you have never had to before. It might be a good idea to write these down in a simple format such "Our Group's Aims and Objectives". Therefore you will be able to advertise your work more efficiently. You should also think about future activities you can advertise.

Recruiting

Once you have decided who you would like to contact and have outlined what your group does, who it works with and what it hopes to achieve you will have formed a good source of information that you can use on leaflets and other advertising. To recruit members you will need to advertise your group in the community. If you are looking for someone with specific skills, i.e. an archivist, it would be best to advertise in their area of work – for example on a notice board at your local archives. If your group has worked in partnership on an event or project previously it would also be good to make use of these networks.

ACTION POINT
You should write a blurb about your group that you can put on small leaflets or use on the web. Make a list of all the places you think will be useful in finding interested people and decide how many leaflets you will need. The information should be: the name of the group, who you are and what you do, address, phone number, email address, website (if you have one) and a name of the contact person, any up coming events or meetings you will be holding. These could then be advertised:

- On local notice boards in local shops or post offices; in Local Studies and public libraries; in a local newsletter; on a website; on local web forums; in local museums.

Another very good way to find new members is by taking part in local events or having a stall at a fair or open day. Attendees to these events will be there because they are interested in their local area or heritage in general so you are more likely to find people who may be interested in your group.

Processing new members
Once you have begun to recruit members you should have a system in place to deal with new membership requests. This means that you can keep track of new correspondence and have some way of monitoring members. You can also include on this form a section to find out about this person's interests, skills and expertise. Keeping your group organised will keep everyone informed and will allow you to report back to both the current group and new members about what is happening. You should draw up a membership form so you have new members contact and other details in a safe place. This can be done in a paper filing system or you can transfer the details to a spreadsheet on your computer.

It is important to tell new members why you are taking some of their details and how they will be looked after, and give them the option to opt out if they want to.

When recruiting new members remember that for some people it is a daunting experience to attend a first meeting with a room full of strangers. Therefore you should have a brief introduction session for new members to give them a chance to get to know people. Perhaps you could give them a small information pack about what you have done before and upcoming activities which will give them an opportunity to tell you how they would like to get involved.

ACTION POINT
Draw up a timetable of future events and let all new members have a copy. When a new member has been recruited make sure they know who they can ask for more information on anything. And finally, make sure there are things that new members can get involved with or have some input in. The sooner new members have a feeling of ownership over some of the group's activities the more involved they will want to become.

Ensuring retention of new members

Recruiting new members comes in two important stages. The first is finding them and then signing them up as new members to your group. The second, which is equally as important, is making sure that they stay over a long period of time and become active members that positively contribute to your group's activities. People will only want to stay active in a group if it provides them an opportunity to become involved.

An important factor to consider that could have drastic effects on the numbers of new members staying with your group are **meetings**. There should be careful consideration of meeting times and locations to reflect the make up of the people in the group. For example if a lot of people in the group work nine until five then it would be counter productive to have the majority of your meetings during the day. The same applies to locations. If a meeting is held in an isolated place but has nowhere for car parking people may be put off coming. You should consult the entire group about the most suitable times and locations for your meetings and arrange around them.

Another thing to keep in mind is ensuring that all members are able to take an active part in the group's activities. It may be useful to create a time plan for the next six months of achievable goals and ask new members what part they may like to be involved in. You could set up a working committee for large events or long term projects and assign members particular roles so they can develop a sense of ownership of your group's activities.

5.2 Recruiting and making use of volunteers

Volunteers are a valuable asset to any group or organisation that functions in a voluntary or not for profit context. There are currently 22 million people volunteering in the UK, almost half of whom volunteer every single week. A definition of volunteering would be any opportunity involving people spending time, unpaid, doing something that aims to benefit society.

Volunteers can be recruited for specific projects or longer term goals and once in contact with the group may progress to become members and support the group in other ways. The vast majority of organisations in the third (charity) sector make use of volunteer time to support their core activities and benefit from it in a number of ways.

Why use volunteers

Volunteers (beyond members) can support your group's activity and help you to move forward with your objectives. The number of members in your group may limit the activities that you are able to undertake. By recruiting short term volunteers for specific tasks or to work on specific projects you will be able to increase your capacity and work on a larger scale.

If you are undertaking project work that is varied and on a limited budget it would be useful to find volunteers with specific skills to complete particular tasks. For example, you may need someone to complete some academic research for a publication or exhibition, or someone with typing skills to help you with transcribing oral history interviews.

Using volunteers will also help you to raise your profile in your local area and become more involved with the local community. You will also be providing opportunities for your local community to take an active part in your project and they will create and encourage publicity around your activity.

Finding volunteers

You should begin by thinking what opportunities you have to offer volunteers. You must have something of value to offer volunteers as they are donating their time and commitment to your group for free. If you need a volunteer you should always have specific tasks you would like them to complete and provide them with opportunities to gain new skills or undertake training.

ACTION POINT

You could look at your group's mission statement and develop your volunteer opportunities from there. Alternatively if you have a project look at your original bid and assess what opportunities you said you would provide for volunteers.

The best place to start when thinking about how to find volunteers is to consider their motivations for doing it in the first place. Volunteers are usually driven by either the opportunity to make use of their existing skills and experience, take a chance to work for a specific cause, gain practical work experience, for the opportunity to work with a specific group of people – or all four. When you have established what roles or tasks you will be able to offer to volunteers then you can begin to advertise and recruit.

You should write a short blurb or description of the work that you would like volunteers to be involved in. Make sure you emphasise the benefits for them as well as your group. You could then advertise in the following places;

- Through 'word of mouth'
- Local press, through press releases (**see 5.6**)
- Door to door leaflets – but consider the cost of this approach
- Use events to recruit volunteers
- Posters
- Your local volunteer bureau
- Social media, advertising on Facebook, Twitter or local web forums.

ACTION POINT
Write a short description for a volunteer opportunity, pick out the key aspects and turn it into a short advert. For example, "Do you know how to transcribe interviews? Are you interested in the history of Morley? Would you like to gain new skills and new friends? Then we have an opportunity for you!"

Policy and procedure

Once you have recruited volunteers it is important that you have the correct policies and procedures in place. It would also be helpful to have one member of the committee or group who is responsible for volunteers. This person should be responsible for selecting volunteers and act as a point of contact if recruited volunteers have any questions or grievances. Taking on volunteers has some of the same responsibilities as employing someone for paid employment and you should have a volunteering policy for your group. In addition to this you should also have an agreement for volunteers which should include a 'role description'. This would cover:

- Role title, objective of the role, outline of tasks and activities, location and work time table, how the role fits within the organisation, skills and qualification required, expenses included.

You also need to consider the legal issues. Role descriptions should only ever describe the expectations of a role and are not a formal contract. You must be careful not to imply a volunteer is under contract to perform specific tasks. If it appears a volunteer is being employed by your organisation, they may be eligible for full employment rights. You could also find yourself unintentionally in breach of a number of employment regulations.

How to retain volunteers

Ensuring the retention of volunteers is similar to retention of new members. They should feel like valued members of the group and feel that they have made an important and lasting contribution. Retention is particularly important for volunteers as you may have invested money and time in providing learning and training opportunities for them.

In addition to this investment you should also have an evaluation process in place to monitor the contribution your volunteering programme has made in the community and what the volunteers have gained from being involved. You should also provide volunteers with some form of recognition for their work or perhaps a certificate so they can show they have gained new skills and been involved.

ACTION POINT
Think of ways that you could show your volunteers recognition for their contribution to the group. Perhaps design a possible event or note the information you might need to include on a certificate of achievement.

5.3 Training new members and volunteers

Training and learning should be central to any community group that wishes to grow and develop. Groups are often made up of individuals with a vast array of skills and knowledge but the opportunity is not always made to share these. Encouraging the provision of training is a way to invest in your members and will develop the capacity of your group in the long term. Providing training will maintain standards and sustain best practice which is important when dealing in a heritage context.

The case for training can be seen as two fold. Firstly, on a practical level providing training for your members and volunteers will broaden your group's skill base. This training can be directed to fill specific skills gaps, for example in finance or budgeting. This will help your group become self reliant and ensure its sustainability in the future. It could also save you money as you may not have to pay to bring in skills from outside the group at a later date.

Secondly, on a personal level some of your members may have been with you for a long time and have contributed a lot of their time, skills and knowledge to your group. To ensure these members feel valued, and to offer incentives to new members, it makes sense to reinvest in these members by providing them with opportunities to gain new skills and knowledge.

Where to start

The best place to start when thinking about training is to look inwards at your group first. You could conduct a **skills audit** of your members and record what specific skills are available within your group. This will help to identify where your skills gaps are and what training you might like to pursue. Once you have completed this exercise you could combine the outcomes with suggestions from members and produce an action plan for training and learning.

Volunteer training varies slightly in its outcomes. If you have volunteers working with your group as a result of a funded project it is usually a mandatory requirement of the funder that you provide learning opportunities for them. If this is not the case it is still best practice to do so. You may have recruited volunteers for specific tasks, and if so do they need training in particular areas to complete this task? For example, object handling or digitisation.

ACTION POINT

Conduct a skills audit and find out what skills are available in your group already. Ask those with specific skills and knowledge to share them with the group through informal training or talks. Then as a group designate one area where you feel your group has a skills gaps and research where this training is provided.

Approaches to training

Training is the term used for any learning opportunity that can be beneficial to an individual, organisation or group. There are a number of different types of training which can be loosely classified into one of two categories – either **formal** or **informal**.

- *Formal training* is usually bought in training that is delivered by experts or professionals and is concentrated in one area of information or expertise. Sometimes formal training is accredited or certified so the trainee may gain qualification after completing the training. A good place to start when looking for formal training would be either your **Local Voluntary Action Service** or **West Yorkshire Archive Service** offers training sessions that tie directly into this accreditation scheme.
- *Informal training* is usually carried out '**in house'** and can be sessions of **skill sharing** between members of the group or informational talks from individuals outside the group. Informal training is usually more about increasing knowledge of a topic rather than gaining specific skills. Asking your members to share their skills through informal training can prove to be an interesting and insightful exercise.

What is available?
Training can be delivered in an array of formats. This can range from an informal talk or discussion to a full day certified training course. Training can be bought in to be delivered in house or trainees can attend training days at institutions or external organisations. The session can be delivered by one individual or a group of people and can range from one on one to group work. The options are almost endless.

For community groups training has been developed by demand from groups asking for help and support in particular areas. The largest number and types of training courses offered are concerning the topic of fundraising. Websites such as **www.fit4funding.org.uk** offer a lot of support and the Heritage Lottery Fund also run workshops with advice about the application process. Umbrella bodies for community and voluntary organisations such as **NAVCA** (National Association of Voluntary and Community Action) or **NCVO** (National Council of Voluntary Organisations) also provide support, advice and some training.

Remember, West Yorkshire Archive Service provides a training programme that supports various aspects of this Accreditation Scheme. If there are areas you feel you need to build up your skills then contact us and we can point you in the right direction.

ACTION POINT
Conduct research into your local training providers through the internet. Get in touch with your Local Infrastructure Organisation such as Voluntary Action Leeds, www.val.org.uk and find out what is available to you free of charge.

Identifying training for members
When considering training for current or prospective members you should first consult the individuals to see if there is an area they would like to improve on. Next think about skills gaps in the group and who might be best to receive training in this

area. It is important to remember that formal training; especially courses that are accredited are mostly expensive and so would have to be budgeted for. It may be of use to send just one member to training so they can bring back the information and share it with the group.

It may be useful to set goals for how much training your group will undertake in a year. Members that have been delegated specific tasks, particularly ones such as volunteer manager should take priority for specific skill building and some money should be accounted for in your budget.

Committee members are key to the way your group functions and so should be a priority to train. This is particularly relevant if you are planning on becoming a charity sometime in the future – maintaining standards of best practice will only benefit the group in the future. Committee members need to have up to date information on current legislation and perhaps some should be trained to manage volunteers. Other important areas include budgeting and finance, fundraising and leadership.

Identifying training for volunteers
When writing job roles for volunteers you should always consider what training you will offer and what skills volunteers will require to undertake the role. Providing training will broaden the opportunities for volunteers both while they are working with you and after. Remember, properly trained volunteers are more motivated, easy to manage, do a better job and tend to stay longer!

Areas of training for volunteers may be more specific, they should receive informal training from members of the group about how the group works and various policies and procedures. They should also receive training about health and safety, ethics (if working out in the community) and specific skills such as handling and storage of objects. If working as part of an oral history project then volunteers will need to undertake training in both technical skills and also interviews skills. More information about this can be found on the Oral History Society website, **www.oralhistory.org.uk**.

ACTION POINT
Write a volunteer role description. Highlight within this what training would be required and what training you would like to provide in addition. Consider what training can be carried out 'in house' and what will have to be done externally and where you can find this is your area.

5.4 Talking to educational institutions

Developing relationships and forming partnerships is a very important aspect of any community group. These groups have usually been set up to preserve a particular history and provide a platform for that issue. In this context your group should do all it can to inform your local community about your work and your findings. The best way to do this is to establish your presence by going into local institutions and holding talks or discussions, and forming partnerships with local schools, universities, colleges, museums and libraries.

Creating a presence in your community
It is important to be aware of your starting point. Just because your group has a wealth of interesting resources and information does not mean that institutions will come to you and ask you to participate. You need to work hard to build up a reputation by making your presence, your collection and your activities known within your local community.

The best way to do this is to advertise yourselves. You should create some publicity material and create a visual presence in your local area. You should also make contact with local institutions so that they know you exist and make note of events they are holding that may be of relevance to your group's work. The key to aims in making this contact is **recognition** and **affiliation**. A good way to do this is through websites as it will give all those that you contact a point of reference.

You should also consider holding stalls at local fairs, offering talks to the community at a local library, making posters that are eye catching, having small displays at local museums or archives, talking to local schools, universities and colleges.

Developing partnerships with educational institutions
The first step you need to take is to get in touch. You should research your local area and find out as much information as possible out about local schools. You can contact your **LEA** (local education authority) to find out about schools in your area. Next you should also research and keep up to date on the **national curriculum** and important national or regional events, such as **Local History Month** held every year. This should help you to build up an idea of where the work that your group undertakes fits in with the national agenda and local institutions agenda's.

Currently in the national curriculum at **Key stage two** it is a requirement that pupils perform a local history study.

"Pupils should be taught the knowledge, skills and understanding through a local history study. This study should investigate how an aspect of the local area has changed over a long period of time, how locality has been affected by a number of factors."

It will take time to build up a rapport with educational institutions. Their business is education and teaching and they already have a vast array of resources available to them. The key activity for your group is to identify where the gaps are and try and fill them. For example, if a local college is running a course on family history you should look at the syllabus and see if there are any areas which correspond with your work. You could then make contact with the course leader letting them know you have resources they might like to use and offer local history talks for those that are interested.

Developing your own resources
Once you have decided that your group would like to become involved with delivering talks within your community you will need to make this opportunity appealing to local institutions. The best way to approach this would be to create your own resources so people can see what you are offering to deliver. This will also be helpful for the delivering of talks and help you to remain consistent in your information.

Think about things you can offer, such as, **talking boxes, formal lectures, informal talks, training sessions, practical sessions, audio visual shows, image packs, collection tours, interactive worksheets, topic guides.**

You should look at creating worksheets or information sheets for school children. Another idea would be to create practical toolkits that are a guide around your collection or archive to encourage participation with your group. Think about the reading age of the text you are producing and including pictures of examples of your collection or activities. Try to make any resources you create as interactive as possible and use all opportunities to get people involved. These resources could be developed around one particular topic, i.e. a local park or about the work you do as a whole.

It may be expensive to create these resources and print them so you could consider developing them for online use or possible create them electronically and use CDs or memory sticks.

Preparing for educational talks
The key to holding successful talks in any scenario is preparation. You should provide informal training for your members about public speaking and engagement so they feel relaxed and confident about their subject when they are delivering talks.

You should make use of the resources you have prepared and take every opportunity to link your talk into the activities and resources available from your group. You should contact the institution the day before your talk to confirm all details and ask if they have any specific requirements of you, for example bringing printed material that can be used after you have gone.

You should always consider the context of your talk. There is no one size fits all format and there may be parts which are more relevant than others. For example, a power point presentation may be well received by older teenagers at a college but may not work as well with younger school children.

Practical considerations

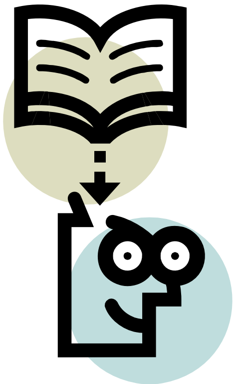
There are a few practicalities that you need to consider when you embark on setting up the delivery of educational talks.

- **CRB checks** – are background checks conducted by the criminal records bureau and are necessary in some situations when you are having prolonged contact with children, the elderly or vulnerable adults. There are two types of disclosure. Basic and enhanced. CRB is not a prerequisite for working with children in all cases; however, having a disclosure would be a practical step. Different schools have different policies so take the time to ask them about theirs.
- **Meeting times and places** – If you are working in a school you need to think about school opening times and where you are going to hold the talks. Are the resources you have created suitable for delivery in a classroom?
- **Contact procedure** - You need to have a formal procedure in place for making contact with educational institutions. There should be one person who is responsible for making contact and recording the progress made. This way personal relationships can be developed and professional partnerships built.

5.5 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Create a mission statement and use with promotional material	
Create a volunteer and new member induction checklist is created and available	
Ensure a Skills Audit is undertaken within the group	
Create a training schedule for the next 6 months	
Produce a timetable of events created and advertise	



6. Audience engagement

Introduction

Audience engagement is the process of ensuring maximum involvement and participation in both your group and its activities. It is important that groups invest in the concept of audience engagement in order to develop your ability to expand into new areas of work, raise your profile, achieve your aims and objectives and campaign on issues that are important to you.

This process is about looking both inwards at your current members and ensuring that they feel involved with the group and looking outward to audiences that you have been unable to engage. You should think about how you reach these audiences and ways that you could expand any of these activities

The process of audience engagement will start with discussions within your group about which audiences you would like to have contact with and which current audiences you should grow. This discussion should then be translated into practical and implementable policy such as a marketing strategy with milestones and goals and creating a contacts database to keep all your information in the same place.

Learning benchmarks

By the end of this section you will:

- Be able to define your audiences
- Understand how networking and working in partnership can help you expand your activities
- Be able to construct a marketing plan to seek new audiences actively

Topics

Resources

6.1 How to reach new audiences

Audiences are important to any organisation, without them groups work in isolation and are unable to spread their message or build a reputation. Audiences can be defined in many ways depending on the organisation, institution or group. For business, audiences are their market and so they work hard to engage that audience and build a positive reputation to ensure they can keep in profit.

This can easily be translated into the context of community heritage groups when thinking about heritage as a product and the dissemination of knowledge as its profit. It is important that groups build their 'profit' in order to stay relevant and be given the opportunities to build on their work in the future. The way that groups need to do this is to find new audiences and build on existing ones.

Where to start
Your entire group will need to be invested in the activity of finding new audiences. It can seem like an undesirable prospect to invite strangers into the group and its activities because of the possibility of interference or deviation from the main goal of collecting and researching. Therefore you will need to make the case of reaching out to new audiences to your group in order for it to be successful.

To attract new audiences you will need to make sure that you are able to offer an ***accessible, inviting and meaningful*** experience for people that are interested in the work that you are doing. There should be an opportunity for individuals to get involved actively in some aspects. This could be attending a talk or exhibition through to offering to volunteer for a specific project.

You should take time to think about the work that your group does and what your profile is within your local community – what are you known for? Who knows about you? How do they know about you?

ACTION POINT
Discuss with your group how you may look to outsiders, to what extent have you made an effort to let people know about what you are doing and how have you done this. You should examine and assess previous advertising material, i.e. leaflets, pamphlets, and pick out the successes and failings of them.

Defining audiences
You need to begin by thinking about who your audiences are. An audience covers **all** the individuals that a group has contact with including those that you are already in contact with. You should divide your audiences into two groups: **1. Reaching out to new groups; 2. Strengthening relationships with your current audience.**

When thinking about finding new audiences a good place to start is looking at your current members and why they have become involved in the first place, was it an interest in the local area that drew them towards your work, perhaps wanting to meet new people in their community. You should use this information and build upon it. If you are going to develop your audience then the first thing you need to do is define and understand who you want attract.

You should think about audiences in terms of the following;

- **Locality** – is it just people from a small area that are involved, would you like to branch out?
- **Age** – is there just one age demographic that you have contact with, what would you gain by opening up to perhaps younger people?
- **Skill base** – have you just attracted people who have the same skills and interests?
- **Cultural background** – is your group as diverse as the community in which you are working, could it better reflect this?

Finding people

Once you have taken the time to decide which audiences you would like to reach out to you need to think how you are going to find and contact these audiences. It needs to be considered what you think people may respond to. You should begin by creating a visual presence in your local area with posters, leaflets and flyers - does your group have a recognisable logo or branding that people can begin to associate with your groups? This is the process of **affiliation**, meaning that people should think of your group when they consider local heritage or history. Making yourself as contactable as possible, through things such as websites, phone, post and mail will make this process easier.

Once you have built up this visual profile you should think about **holding events** to give people the chance to meet you and discuss what work your group undertake. This could be done independently or in partnership with other organisations or possibly regional events giving you the possibility of raising your profile through local museums, libraries or perhaps fairs.

These events provide the perfect opportunity for you to find new audiences and give people an opportunity to meet you. If an event has been planned well and sufficiently advertised then it is likely that individuals will have a positive experience of it and want to come to another event and tell their friends about it.

ACTION POINT
Think about holding an annual event around a theme or topic, creating a regular event will keep audiences interested and aware of the group. As a group you could select an events committee whose responsibility it is to create an events programme aimed at finding new audiences.

Be innovative

The final important thing to consider when trying to find new audiences would be to try and think innovatively. It would be a lot easier to find more of the same audience as you have already developed that base. However, it is far more of a challenge to reach out to completely new audience – this requires a lot more creativity. Other community groups have achieved this by running projects that work outside of their comfort zone to meet new audiences and encourage others to get in touch with them. For example, a community heritage group could work with a local youth theatre group to create a play using some of their collection. This would build relationships across generational boundaries and form knowledge of each of the groups in other communities and have the bonus of challenging other people's perceptions and stereotypes.

You should think about working outside of your usual comfort zone and making use of new skills to find new audiences.

ACTION POINT

Brainstorm with your group about new and different ways you could work in. Have you ever worked in partnership with a group not working directly in community heritage? Do you have any links already developed that you could take advantage of?

6.2 Sharing and networking

What is networking?
Networking is a way of sharing information between individuals, championing an individual's or group cause or simply meeting people with similar interests. It has become popular within every sector over the last twenty years as it is seen as an effective and informal way to share information and ideas and in the process building support for a cause or specific topic.

Networking can be done on either a **personal level**, to gain more contacts and possibly further your career, or on a **representative level**, acting as a representative for an organisation or group and spreading their message.

Networking can take place in a number of ways - in an arranged atmosphere such as a formal networking event where individuals meet others one on one and share their information or it could be a more informal meeting where groups present information to others. Central to either of these formats is the creation of a knowledge sharing opportunity and the promotion of the benefits that sharing of information can have for both individuals and for groups.

Benefits of sharing information
Community groups can sometimes find themselves working in isolation or attempting to protect the work they are doing from any outside influence. However, opening up your work to others and sharing information and, in particular, ideas often allows groups to expand on their activities and find new ways of problem solving.

Networking and sharing information will open up new and often essential support networks, providing contact to individuals and groups with specific skills that could directly benefit your work. Conversely, you may find people that come to you to ask how you have achieved certain projects or activities and how they could apply that success to their group.

Your group should think about what other groups are active in your local area, do you know any of them personally? Have you ever had any contact with other groups before? Are you aware of the work they are doing? Another way to approach this would be to consider if other groups know about you and your work. How could you let them know? Does any of your work complement each other?

ACTION POINT
Conduct some research in your local area to gauge the activity of community groups around you. Think about the parts of your work that complement each other, for example an environmental group may be interested in the landscape around an area that you have been collecting heritage information for.

How to go about it

Once your group has decided to get involved with networking and sharing information then there are a number of ways to go about it. You can either decide to try and get involved with networks and events that are already running or alternatively you could set up a network yourselves.

- **Online** – You could make use of local online forums, by posting topics and starting discussions with others who are interested in your area of work. You could also set up a blog and ask other groups in your area to contribute to it.
- **Meetings** – you could set up bi-annual meetings in your local community and ask other community groups to attend and possibly do presentations on their work. This would be a very good way to inform others about your work and develop working relationships with other groups.
- **Events** – holding or getting involved in external events is another good way of information sharing. You could pick a theme each year and hold an annual conference asking other groups to hold stalls, or become speakers.
- **Networks** – finally you could think about hosting your own network. This could be done online or through meetings in your community. You could include as many or a few groups as you like and use it as a forum for discussion, shared problem solving, knowledge exchange or to decide to work together to champion a specified cause.

ACTION POINT

Discuss with your group and create a plan of action regarding information sharing and networking. You should outline three of your activities that you think others should know about and then find three things that you think you could learn about from other groups, i.e. how to build a campaign.

Ways to take it further

Your group could also look into national initiatives that are being run for community heritage groups and find ways of getting involved. Ensuring that you send delegates to national conferences is always a good way to maintain your profile on a national platform. There are also often opportunities to send speakers to present on certain topics at both regional and national conferences, you should use these opportunities to champion the work that you do.

6.3 Marketing events

Marketing events is about making sure that as many people as possible know about what you are doing and ensuring that these events are as inviting and as accessible as they can be. Generally speaking events are held to showcase information or knowledge, encourage discussion or debate or bring communities together – none of the aims would work without people attending the event.

It is necessary to dedicate just as much time to marketing and promoting your events as it is to designing it and this process should be central to all event planning. Having an events committee may also assist you in making sure that attention is being paid to the marketing of events.

Holding successful events
If events are properly planned and efficiently delivered it will make them far easier to market and promote. Setting an agenda, settling dates and confirming themes and activities at the earliest point possible will allow you a lot more time to drum up interest. Word of mouth is usually the most effective marketing tool that you will have access to, but this takes a long time to develop and have an effect, so the earlier the better!

Ensuring that sufficient planning has gone into events will also increase the likelihood of holding a successful and well received event. This will only work in your favour in the future as recommendation from friends will be a major factor in pulling in new audiences.

ACTION POINT
Create a checklist for things that you will need to organise for an event and create a time plan and who would have to work on which area. How will you make your event unique? How can you monitor its success?

Creating promotional material
Promotional material is another important aspect of being able to get your message across. All material you create should be eye catching and easy to read with simple and clear information provided including, time, date, locations, title, cost (if any) and contact details.

However, it is also important to remember that creating publicity material can be very costly in terms of printing and possibly paying someone to design for you. If at all possible you should create leaflets and posters that can be used for a variety of events by perhaps leaving space on the design for you to write in the specific details of each event. This will also maintain consistency in your visual profile in the area as these posters may become recognisable in the community.

You will also need to think carefully about where your publicity can be distributed. Could you send your publicity electronically via mail out? Is it possible to post information on your website? Think about making use of online local listing pages or websites specific to heritage and archives.

Inviting the media

Trying to get media coverage for the events that your group is holding will drastically increase the number of people that you can reach and potentially attract. Generating media interest can seem like a daunting task but the benefits of having the name of the group printed nationally or regionally will be noticeable. The best way to getting local, regional or national media coverage is to make use of Press Releases. These are documents sent out to contacts in various parts of the media that supply information about events or groups in an easy to consume format.

There is a fairly strict format that needs to be adhered to when writing a press release. Remember, journalists will receive hundreds of press releases a week, it is therefore important that you work to ensure that yours will standout. The first thing that you will need to decide is what audience you will be writing for? You should think about**, local circulatories, local newspapers, regional press, national press, radio stations and TVs.**

The next step is to construct the press release content. Information should be clear and to the point, all necessary information such as time, place, date and contact details should ALWAYS be included. The essential questions that you will need to answer are – **What, Where, When, Why, How**. You will need:

- **Headline** – this should be as 'snappy' as possible and should accurately identify the main themes of your event. Under the headline you should include a press release date.
- **First paragraph** – this is where all essential information should be included, why is this story of interest to readers? Often, journalists will copy and paste sections of your press release straight into the text.
- **Second paragraph** – this should include relevant but not essential information, this is usually where the background information about an event or organisation will go.
- **Further paragraphs** – Press releases should be no more than 250 words or 4/5 paragraphs long any further information, such as organisational details should be included at the end.
- **Quotes** – It is advisable to include quotes from either a member of the group or someone high profile that is supporting the project or event. These need to be relevant and to the point. You should include quotes in the body of the text after the first paragraph.
- **Notes to editors** – This should include any information that will be important to the editors but does not need to be included in the press information, such as contact details or permissions to use images or quotes.
- **Images** – It is advisable to use images as they will be a big draw to journalists wanting to cover your story – particularly if they are archive photos. However,

you should only include a thumbnail version of the image in the electronic version of the release as big images can clog up email accounts. You should then make reference within the notes to editors section that full versions of images are available.

Please see section 6.6 for an example of a Press Release.

ACTION POINT
Using the example provided write a press release for a hypothetical event that your group will hold. You should think about what they key bits of information are, do you have a unique selling point that could draw in audiences? Who would you send this out to?

Making use of social media
The final way to ensure that you are able to raise your profile and find new audiences would be to engage in social media. This could be done as part of a marketing strategy for the group or as an exercise to increase audience engagement in general.

Social media is a fairly new domain that community heritage groups have branched out into with a lot of success. The term social media encompasses all non traditional media used on the internet that can range from blogs to forums to social networking. It is important that members that engage with social media understand the technology before they begin to use it as misuse or misinformation could be damaging to the group's reputation.

Social media provides the potential to let more people know about your activities and advertise and promote your events on a far larger platform – which is for the most part free! Outlined below are the key elements and applications of social media and how community groups might use it. For more detailed information West Yorkshire Archive Service provides training sessions on social media in the context of community heritage groups.

Blogs: a blog is an online journal where individuals are able to post their thoughts and comments on any topic they pick. The word blog comes from the term 'weblog'.
Photo sharing: These are websites which allow users to upload images through a profile. Images can be managed by categories and there is facility for feedback from other users. Photo sharing is a good way to show pictures from events you hold or images that you have collected.
Podcasting: These are a method of broadcasting and sharing multi media files over the internet. They can be either audio or visual documents and can be either streamed live or downloaded. These can be particularly useful for oral histories or heritage trails.
Social networking: These are websites on which an individual or organisation can create a profile to share information, thoughts, photos and videos with others on that website. Users can create events and invites others to attend.

6.4 Raising the group profile

The profile of a group is the way it is perceived by others and the extent to which it is recognised or known about. The process of actively raising the profile of a group provides the opportunity to alter the way that people perceive your group and the work that you do. Groups have often worked very hard to gather together the collections they have created and spent a lot of time researching local history or specialist subjects. However, as community heritage groups often do not engage fully with their surrounding community this hard work is not always put to good use.

Raising a group's profile will expand its potential and what it is able to achieve. You can become more visible in your area and hopefully more meaningful to your community. Often the result of successfully raising your profile can be that other organisations take note of the work that you and offer you opportunities to work together.

Create a marketing strategy
Understanding of your potential audiences and preparation are key to any attempt to raise your profile. The best way to begin this process would be to create a marketing strategy that can look at long term goals and how they might be achieved. This strategy need to begin by asking the questions **When, Who, Why and Where?**

You need to spend time planning your communications and how you are going to apply them to ensure you don’t waste time and any potential investment. After you have decided who you are going to attempt to contact you should then decide how you would do this. There are a number of ways to get in contact with people and actively raise your profile.

You should think about:
Word of mouth – a powerful and free marketing tool which is usually a product of running successful campaigns or events. Word of mouth often takes a long time to take root and a lot of work needs to be done beforehand in terms of engaging with audiences and making sure that the work that you are doing appeals to a wide range of people.

Online – there are a lot of online resources that you could make use of. Social networking websites such as ‘Facebook’ and ‘Twitter’ will help you to build up your presence online and help you to become recognisable, it will also help you to advertise any events you are holding. Applications such as blogging allow a group to let people know about the day to day workings of community heritage groups.

Newsletters – can be distributed both on and offline and maintain regular interest in what you are doing. They should contain interesting information and updates about the work that your group is currently involved in and possible interesting local news and notices about up coming events. The content of Newsletters needs to be relevant to your audience, ideally centred on one topic, issue or locality. Giving members of your community the opportunity to get involved with the newsletters, for example, in a 'Your Views' section, will also help to maintain or increase readership.

Events – Events are probably the best and most effective way for a community group to raise their profile and find new audiences. This can be done by either holding their own event or piggybacking larger events run either regionally or locally. A good example is that of Local History Month held each year in which local councils usually become involved.

A good event will allow groups to showcase their work and champion their cause to a varied audience. It will provide opportunities for interactivity and allow individuals to engage with local issues and find new information and knowledge which is relevant to them. Activities are also always a good idea to encourage families.

ACTION POINT
Create an edition of a newsletter that you would send out to members and interested people in your local area. The content of the newsletter should relate to events and information from the last month of your groups activity. Think about what information you need to include, what would encourage people to want to find out more? What things do people need to find out about the future of your group?

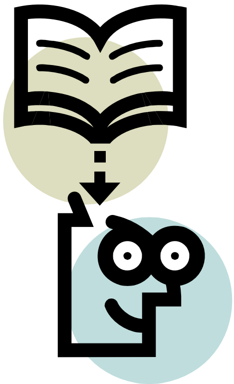
Maintaining a high profile
Once you have made the effort to begin raising the profile of your group it is important that you are able to maintain and build on that success. One way to do this is to monitor the interaction that you have with new audiences by collecting their information for a mailing list or your newsletter. By doing this you will be able to track your progress and the demographics that are interested in the work that you do.

Once you have identified which audiences you have contact with it will help you to recognise which audiences you have been unable to reach. Your group could then think about why some of your work has not appealed to these people, or how you might better engage with new audiences. Maintaining success is about learning from past experience of what works and building on that.

6.5 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Complete an exercise in audience mapping	
Create a template for Promotional material in a digital format	
Contacts database compiled in an accessible format of all current and possible future contacts.	
Press release template prepared and press mailing list compiled	
Contact information collection at events and information gathered effectively	



7. Memory collection

Introduction

Memory collection, including oral history, is particularly important for community heritage groups to consider. An oral history project is the perfect way for a community group to take hold of a process from start to finish, and end up owning an archive they have created themselves. A local history group often has the benefit of a large amount of local knowledge. This will bring in big advantages when running a memory collection project, as such groups will usually have a good idea of researching something of particular local interest or something that has not been covered before. They will know what questions to ask and who best to approach.

Once an oral history archive has been put together, it is an archive in the same sense as a collection of paper (newspaper, photographs, diaries) or material (objects, memorabilia) records. It is certainly as important and will need the same consideration when considering preservation and should be promoted to the same level.

Learning benchmarks

By the end of this section you will:

- **Understand what oral history is and its importance to community heritage.**
- **Know how to plan and manage a memory collection project.**
- **Be able to identify and tackle issues of permission and copyright in terms of oral history.**

Topics

Resources

7.1 What is oral history?

Oral history can be defined as the recording, preservation and interpretation of historical information, based on personal experience. It is the recording of someone's memories and experiences, usually in the style of an interview. The *interviewee*, sometimes known as the *subject*, might share memories of people, events, and/or experiences, as well as opinions and emotions that they remember, witnessed, experienced or felt a part of during their lifetime.

Oral histories act as a way to preserve the memories of older people who were born and brought up in a time and era quite different from today. On the other hand, the oral histories of younger people can also act as valuable resources and be a way of capturing the whole of a subject.

These memories reflect both the past and the present because the histories discuss the past in the terms of today: from the age of the interviewee and how their memories have been shaped over time, to the style of the interview, the questions they ask and the interviewer themselves. All these factors shape the oral history that is produced.

It is important to remember there are different types of stories and memories that can make up oral histories:

- Direct memories – memories of the interviewee derived directly from their experience.
- Community memories – generalisations or groups' experiences.
- Memories of stories and oral culture – stories that have been passed down, usually by family members. The subject of the interview did not experience the event, but has been told about it by someone else. For example, *"My Grandma said there were thousands of people there"* might mean there were indeed thousands of people at the event, or it might be an exaggeration either by Grandma or by the interviewee to make a point.

Case Study

Oral history in the modern form of audio recordings has its origins in the work of Allan Nevins at the University of Columbia in the USA. He began to record the memories of 'persons significant in American life' in 1948. There are earlier examples of people collecting oral histories but Nevins set out with a mission of recording, transcribing, and preserving oral history interviews.

By contrast to this 'great men' approach, the pioneer of oral history in England, George Ewart Evans, collected memories of life and work in Suffolk villages, where 'the old survivors were walking books'. These were first published in *Ask the Fellows Who Cut the Hay* in 1956. In their different ways, Nevins and Ewart Evans reflected the changing political and social climate of the early post-war period – just as more recent oral history work has developed its own distinctive forms in other areas of the world.

In one sense, there is nothing new about oral history. The spoken word was the only form of 'history' in pre-literate societies – and we often forget how much history is based on story telling. Many cultures and traditions rely on histories being passed down verbally.

There are often doubts over the credibility and reliability of memory collection. A Greek historian, Herodotus, ranked 'what you have been told' (after what you have seen or what you have read) as the most unreliable form of historical evidence. However, all historical sources have their problems, and oral history is not necessarily any more biased or partial than documentary evidence. It needs to be subjected to the same tests as we would apply to other sources, and used in conjunction with them. The value we place on oral history will depend on our own perceptions of what or who history is about, and what it is for but arguably it can offer unique opportunities and insights.

For a long time, many professional historians rejected the idea of using oral history as a source for writing about the past. It was felt that peoples' memories were not as reliable or verifiable as official documents and manuscripts. However, oral history adds to the tapestry of historical capture and provides a new dimension and a valuable insight. It is also often the type of history that is not recorded in any other way, such as everyday experiences that are not detailed in 'official records'.

Oral history allows the recording of social history, giving versions of events from a new angle as well as recording the everyday aspects of a culture, generation or class. It can also include people who might otherwise be hidden from the history books, those on the margins of society – the minorities in society as opposed to the famous figures and important events. The communal and individual memories and the nature of them are as much a part of oral history as are the assumptions and concerns of the time in which it is recorded.

ACTION POINT

Find out more about oral history and memory collection from the following sources:

- The Oral History Society website: www.ohs.org.uk.
- The British Library Sound Archive: http://www.bl.uk/soundarchive.
- Contact your local library to find out if they hold copies of these publications: The Journal of The Oral History Society, Oral History Review (published by The Oral History Association), Oral History: A Handbook by Ken Howarth.

7.2 How to start a memory collection project

When first approaching a project in which memory collection will be used, try to think of what interests and inspires you. In this sense, you are more likely to stay with a subject that you are committed to.

It is important to outline firstly any key aims or objectives in order to start looking for appropriate candidates. There are usually various different approaches in collecting oral history:

1. **Centre your work on a particular theme**. This can be any topic that interests you. Consider using a theme that you will be able to collect enough memories for. This may require some background research into what is popular in your area. If you are determined to use a topic that is not as prominent for people local to you, you may have to travel further afield to carry out your project.
2. **Centre your work around a specific area**. It is obviously a good idea to use your local region but you will need to decide at what level. You may want to concentrate on your immediate locality (e.g. your suburb/village) or you may want to use your nearest metropolitan area or city centre where the response may be higher.
3. **Centre your work on a certain time period**. This will clearly need to be within living memory of any candidates approached. You can choose certain time periods, such as post or pre war, or a certain decade.
4. **Centre your work around the interviewee themselves**, their past, their opinions and the life they lead.

It is exciting to consider that your oral history project can cover any area that you choose. There are several project themes to think about to help get your work off the ground:

- Family History – If you would like to compile a piece of work on your ancestry (whether on one person or your whole family), oral history can be a useful and effective way to add character to any records that you find.
- Local History – Oral testimonies can produce the narration to particular events or sites in your area. If varying candidates are chosen (e.g. by age, race or gender), the resulting interviews can help explain the development of a city, town or village.
- Cultural History – You may want to consider concentrating on a certain aspect of your local area, such as how a particular group of people came to live there.
- Social History – You could pick a part of your life that is important to you and see how it has developed over time. For example, you may want to interview older people and find out if the way that they spent their spare time as young people is different from today. Social history can also cover our day-to-day lives, how we work and how we interact with those around us.

There are many avenues that you can take in finding someone to interview to start your project. Due to the universal nature of oral history, it can happen anywhere and can include anyone. In turn, this makes searching for interviewees easier. Remember that the individuals you choose, dependent on your project topic, do not have to be older as the beauty of oral history is that the memories of younger generations will also be interesting to audiences now and in years to come.

ACTION POINT

Finding interviewees:

- For family history projects, members of the family are an obvious choice.
- For local historians, residents of the area are a suitable group to approach.
- To attract wider interest, advertise in local newspapers and shops, as the choice to participate is left open.
- Also consider using local resources such as nearby community centres, local radio stations or community websites for interest and further ideas.

Once you have chosen one or several individuals or groups to approach for your oral history project, it is best to contact them either in person or by telephone as it will appear more personal. This will give you the opportunity to explain fully who you are, what your project is all about and what you would like to talk to them about. Any correspondence by e-mail or letter will seem formal and the recipient may consider their letter or e-mail to be a circular and that you have not selected them specifically to help with your work.

Make your proposal to them informal. An official sit down interview can seem daunting, especially if your candidate may feel that they do not have anything useful to offer you. Invite them to have a chat with you about the themes your work will be based on and explain how they will be able to help you with this.

It is essential that you persuade whoever you have chosen that their memories are important and central to the project you will be carrying out. If it is a whole group that you are pitching your idea to, it may be a good idea to prepare a quick five minute talk inviting any members to get involved. After all, it is that group or individual you have selected and if you make any candidate aware of this, it will go towards making them feel valued.

7.3 Carrying out oral history

Broadly speaking, there are three stages to carrying out oral history projects:
1) Preparation work; **2) The interview**; **3) Organisation and preservation**.

1) Preparation work

It is essential to prepare fully for any interview that is being carried out. Not only will this give the interviewer a clear plan to work from but can also help to make the subject feel more comfortable and lead towards producing a useful testimony.

You may want to consider the following points first in organising your oral history project:

- Arrange to meet your candidate in person or question them over the telephone as character and true meaning can be lost through e-mails and letters.
- Arrange the place and an exact time so that the interview can get started quickly. This means that what time you have can be used effectively.
- It is usually a good idea to meet at the individual's home as they may feel the most relaxed there but it is not essential if you are not comfortable with this. It is a reasonable request to hold the discussion in a safe public place.
- Try to insist on a one-to-one interview. Even a partner or a close friend of theirs present can limit how honest an interviewee will be and what sort of information they give.
- It is sensible to make family and friends aware of where you are and who you are with. If the person who has agreed to talk to is comfortable, you may want to ask someone else to come along with you and wait in another room or area of the meeting place.

Before talking to anyone about their memories and experiences, some research work will need to be done on the chosen theme or topic. It is also important to learn a bit about the person you are interviewing, even as a matter of courtesy. This can help in identifying any issues that need to considered, e.g. any cultural or personal sensitivities.

You can find out some really useful information that will assist in this research by visiting your local archive or library. It is a good idea to get in touch with the office first to find what records or material they hold that will relate to your chosen subject, place or person. This will especially help if the person you are interviewing has had any standing in the local community and may appear in documents such as past issues of newspapers. You can find out where your local archive is by visiting the ARCHON Directory website at www.nationalarchives.gov.uk/archon.

Any background research will aid in developing a set of questions or, if you do not want your preparation to be too rigid, the areas that you would like to cover and the general course you would like the interview to take.

The next area to consider is the questions that you will ask as part of the interview. First and foremost, the golden rule is to keep any questions simple and direct so that it is clear to the interviewee what you are asking them. Do not make suggestive comments within a question, such as 'I suppose that you…' or 'You must have…'

Ask questions based on: **Who, What, Why, When, Where and How?**

These words can also be used alone to follow up any answer given that you would like some more information about. If a response is given and you would like more details about it, think about asking why something happened, how it made them feel or what the result of a particular event was.

ACTION POINT

- Prepare your interview based on the chronological events in your interviewee's life. For example, first approach their childhood, then their young adult life and their adult life. You can then tie their memories in with your chosen themes, e.g. if your project is centred on a political movement in which your candidate was involved at a younger age try to bring this in during the middle of the interview.

Points to remember:

- Are there enough people willing to give their memories on your project themes and are there any records held in local archives or libraries to support your work?
- Have you picked the appropriate person or people to interview?
- Do you know what you want to achieve by talking to each person? Remember that each person will be different with separate memories and experiences and you will need to allow for this.
- Do you have a general path that you would like to interview to take?
- Do you have a set a key questions that you would definitely like answers to or information about?

2) The interview

Whatever preparation is done before an interview, do not bring a script or detailed written notes with you and do not expect any interviews to take a precise path. It can be off-putting if you are concentrating too hard on a set of papers and it may seem that you are not giving the individual your full attention. Your chosen candidate should also be given the space to answer as fully as they wish to. The beauty of oral history is that any information gathered is unpredictable and may even open up a new angle in your area of research.

ACTION POINT

Before you ask your first question, there are several steps to take that will help with the smooth running of the interview:

1. Choose a quiet location in the venue where you have met with your candidate.
2. Remove any distractions including telephones, televisions and radios.
3. Set up the equipment out of direct sight of your subject as this can be off-putting.
4. Carry out a test recording on your equipment to check that the levels are set and everything is working properly.
5. If possible, take a photograph of the setting and gather any papers or items that are being offered. These can be used during the interview and act as 'memory-joggers' but they will need to be described fully in the recording for your intended audience.
6. Get the interviewee to sign all permission forms and clarify that they are aware of all aspects of your project and what you will be using their testimony for.
7. Finally, record the date, time and location of the interview and the full name of the interviewee on your equipment.

The interview process can be difficult, especially if you do not know your subject personally. However, it is more important that you make them as comfortable as possible as they are a willing participant in your research project.

It is understandable that you may be nervous if you are carrying out your first interview. However, your candidate will have their own concerns especially if you do not know them personally. They may feel that they are unsure about where you will take the discussion, the issues that will be covered or if their memories are of any interest to you and your work.

Therefore, remember to present yourself in a personable and calm manner. It is vital to maintain eye contact throughout and whilst this can feel uneasy to some people, it shows that you have an interest in what your interviewee is saying. This, in turn, may provoke them to open up more to the questions being asked.

If something unexpected happens, do not let this distract from how the interview is progressing. It is inevitable that sometimes there will be an issue with your equipment or your candidate will refuse to answer a question. Accept that this will not be detrimental to your overall project outcome and move on.

Points to remember:

- DO NOT let any stereotypes about the individual or their background effect the way in which you conduct your interview.
- DO NOT disrespect the opinion of your interviewee even if it is not something that you like or agree with.

- DO NOT push your candidate to reveal anything to you, whether it is of a sensitive nature or not. You must be aware of emotions and the right to privacy.
- DO NOT interrupt. Wait for the interviewee to finish speaking before asking other questions and write down or make a mental note of something you can come back to later.
- DO NOT let yourself or your subject get tired. The information gathered after this point will not have much use and you can always reconvene another day. You can take breaks to help combat this.
- DO NOT respond in a negative manner. Always be interested in what your candidate has to say and avoid appearing unsure about their testimony. You can ask for clarification on anything you are confused about.

Nevertheless, do not be afraid to ask any questions, as long as they are not offensive. Your interviewee can always refuse to answer and you can make this clear to them before you begin. In the same sense, it is reasonable to go back over what your subject has said. For example, you can clarify what words or phrases mean (different dialects come with their own vocabulary) as this could have implications for the context of the conversation.

When asking any further or unplanned questions, remember not to jump abruptly from one subject to the next. This can be confusing for the interviewee and may even seem as though you are not interested in what they have just told you and are rushing them forwards.

Even though it is not an eventuality, prepare yourself for any emotions that your candidate may have about the memories being discussed. They may well become upset over certain issues. Whilst this is perfectly acceptable, consider terminating the interview if the situation becomes too distressing for either party. You can always take a break or continue at another time when there is a calmer atmosphere.

Once the interview is over and you are satisfied with the amount of information gathered and its content, remember to thank the interviewee and stay for a short chat if they would like you to. Making a quick exit looks ungrateful when this person has taken the time to talk to you and share their memories.

Collect contact details from your candidate and ask them whether they would like a written or digital copy of the interview. You can also use these contact details to send them a thank you card for giving up their time and further correspondence on how your project is coming along.

3) Collection and preservation

It is vital to take all steps possible to keep any material safe and preserve it properly for present and future generations. This includes transferring anything in a digital format to a computer that will be able to cope with the file size.

ACTION POINT

- Keep another copy of a recording in a different place other than on a computer as well. You could consider saving to disk (e.g. DVD or CD) and keeping a paper copy if you have decided to create a transcript of the interview. Only when this has been done can the memory card on the equipment you have been using be wiped ready for the next recording.

You must at least write a synopsis of each interview giving the main themes and points covered. You can also think about producing a full word-for-word transcript. This will come in useful but is time consuming and so not essential if you do not feel you have enough time left in your project work plan.

It is essential to organise any recordings that have been collected properly so that they can be accessible in the future. First of all, remember to never ever edit the material that you have collected. This will more than likely change the context and meaning of the testimony that will have taken a lot of time to find and collect. This is completely the opposite result that oral history should produce, given the frequent spontaneity and irregularity of speech. However, it is reasonable to check any details against surviving records in archives and libraries.

If you have used the testimony of more than one interviewee in your project, it is a good idea to give each a personal file labelled with the person's full name, date of birth, date and place of interview, type of equipment and number of discs used and how the recording is being stored.

Each file should be given a unique name or reference number, which will help in the event of creating a series and knowing where everything you have worked on already is. It is sensible to include any consent forms and transcripts, along with any other material used (e.g. photographs taken) in each personal file.

7.4 Equipment

There are certainly problems arising from the choice of equipment being used in oral history projects. This is mainly because there is a constant struggle to keep any digital records (files etc) up to date and in a format that can be easily used with the continued development of technology.

The use of equipment in recording oral history interviews is extremely important as it is difficult and almost impossible to write down everything that a person is saying without losing words or meaning. This is crucial to the forming of a useful and historically-important testimony.

ACTION POINT

- If you are unsure, contact the British Library Oral History Department (see website in **section 9**) or any relevant group or organisation local to you for advice.

You can consider using audio or video (audio-visual) recording equipment in your memory collection project.

Audio recorders

The type of audio recorder you decide to buy will of course depend on the funds available to you – see section 7 Funding and Resources for information on how to work out how much your group has to spend.

Traditionally, most oral historians use analogue recorders, such as audio cassette, or equipment in an older digital format, such as minidisc. More recently, ‘solid-state’ digital recorders have become popular, which record straight to a memory card or hard drive built within the piece of equipment.

There are a few features that you should look for when purchasing an audio recorder:

- Can record in stereo using two external microphones.
- Can record compressed files in a widely recognised format. According to the Oral History Society, you should look for PCM WAV (or .wav) files at 44.1 kHz 16 bit or 48 kHz 16 bit. This should take up around three hours of a 2GB memory card.
- Be able to connect to a computer to upload any recorded material easily for the purposes of security and long-term storage.
- Use rechargeable batteries and mains supply charge.

Points to remember:

1. Avoid recorders that are not in a widely recognised form. This will have future implications for long-term preservation and storage.

2. Choose the highest recording quality and equipment available to you.
3. Always make sure that your computer system will be able to cope with large audio files and has sound anti-virus software installed.

Video

If such equipment is available to you in your oral history project, do not disregard the use of audio-visual recorders, as they do not differ much in price from audio recorders.

Although opinions do differ on the benefits and downfalls of the use of video in oral history interviews, it does present opportunities to use as part of a presentation or to capture visually any other material used in an interview, such as photographs. However, some feel that the use of video can have a negative impact on the relationship between interviewer and subject, if the person giving a testimony is particularly uncomfortable with being caught on camera. It is always a good idea with audio-visual equipment to make an additional copy of the original tape produced so as not to lose any important data. MiniDV video is often the most popular video format.

To preserve this material, recordings can be copied to compressed files onto a hard drive, e.g. MPEG-4 or JPEG2000.

Points to remember:
1. Where possible, bring someone else along to an interview to operate the camera. It can be their job to concentrate on aspects such as lighting and sound whilst you can focus on talking to your interviewee.
2. Always try and film in front of a plain background and not in front of a light source, such as a window or lamp.
3. Place the equipment in a position that both you and your subject are happy with. Some people will be comfortable speaking directly to the camera, for example, whilst others will not.
4. Use a tripod to steady any equipment that you are using.
5. Use the zoom function instead of moving the actual camera around if there is something worth taking particular notice of. This, along with the tripod, will create a more professional-looking piece of recording in the end.

With any sort of recording equipment being used, there is also the option of using an external microphone (not a microphone that is already built into your equipment). There are some golden rules worth taking note of when using microphones to capture an oral history recording:

- Try to use equipment where the microphone is separate and not built in to the main body. This usually produces a higher quality of sound.
- Position the microphone as close to the interviewee as possible. For indoor use, lapel or clip-on microphones are best. For outdoor use, hand-held microphones are effective in picking up limited background noise.

- Try to avoid anyone touching any cables whilst a recording is taking place. This causes disruption in the sound.
- Where funds and resources are available, use two microphones (one for the interviewer and one for the interviewee). If you have one microphone at your disposal, place it closer to your interviewee. If questions are asked loud enough and clear enough, this should not cause any problems.
- Consider that there are microphones on the market that will record a group interview. If this is appropriate to your project, it could save you a lot of time.

The whole issue around using audio or audio-visual equipment in an oral history project is of course the cost involved. Even if there is not a large amount of funds available to you, you should always buy the best quality for your money.

ACTION POINT

When looking to borrow equipment have you contacted the following groups or organisations?

- Relevant groups in your area that have carried out memory collection projects.
- Schools, colleges or universities that have a technical or ICT department.
- Local library or relevant organisation that will support your project. It is best to look for contact details via your local authority's website, which can be found at www.direct.gov.

7.5 Documentation and permissions

The rights of the interviewee must be protected when recording their memory, storing it and making it available to others. A consent form must be signed by both parties (interviewee and interviewer) before the collected recording or material can be used in any way. These can either be an agreement for the recording to be used in any way or a list of particular ways the recording can be used.

If the consent form authorises a number of particular ways in which material can be used, this also gives the subject the chance to state which parts of their testimony cannot be made public and if they are not happy with their words being used in any format. For example, the subject may be happy with the recording being used as a sound file on a website but not being published word-for-word in a local newspaper and may want certain names or personal details left out.

A consent form is also where you can determine whether any access restrictions need to be placed on a part of or a whole recording. You will need to check that any material being seen, heard or read by any other person does not breach the Data Protection Act (see section 4 of this accreditation scheme for a further discussion of these pieces of legislation).

Copyright law must also be considered alongside consent permissions. The copyright on any recording or material created as a result of an oral history interview must be fully understood as misuse of this material could lead to prosecution. Even if you are carrying out your project on behalf of a group or organisation, copyright law is personal and not corporate and so it will be you only who will be held responsible for a breach in this legislation.

There are two copyrights present in an oral history recording:

1. One copyright belongs to the person making the recording (or the organisation they are representing).
2. One copyright belongs to the interviewee and their heirs since it is their words that are being spoken.

The duration of either of these copyrights is fifty years from the end of the year in which the recording was created.

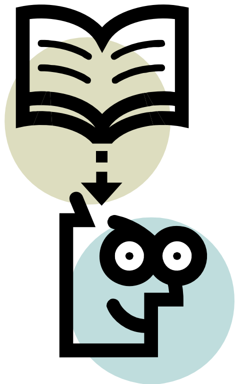
If a recording is used in a public place (such as an exhibition, project launch or on a website), permission from both copyright holders must be obtained. In the same way, the names of both copyright holders must be acknowledged, as discussed earlier in this sheet.

Please be aware that anything else used in an oral history recording, such as a poetry reading, photograph or piece of music also holds it own separate copyright. This must be cleared or permission gained before the material is used in the ways mentioned above.

7.6 Accreditation checklist

To complete this section, your group will need to have carried out the following tasks and provide evidence where possible:

Task	☑
Researched oral history and its techniques	
Created a project brief after brainstorming ideas within your group	
Created a work plan and time table for your project and designated jobs to group members according to their strengths	
Promoted your project in your local area to gain enough interest and interviewees to carry it out	
Acquired the appropriate equipment (either bought or loaned) following research and advice	
Created a permission form, outlining consent from the interviewee for the ways in which their memory can be used	
Recorded at least five interviews, saved them in more than one format and created a synopsis and/or transcript for each	
Organised all material collected as part of the project into a system (paper and electronic) with unique names or reference numbers, labelled with the interviewee's full name, the date of the recording and the project title.	
Used the material from your project in an outreach or public event, such as an exhibition, open day, local fair etc.	



Finance and Budgets

Introduction

Good financial management goes a long way to ensure the sustainability of a community archives group and its work. The financial climate for such groups can often be uncertain but good practice in this area means that any issues or problems can be prepared for and tackled. Managing finance is all about managing how a group's aims can be reached. It is making sure that what money and resources a group does have is being spent or used in the most efficient way.

One or two group members may be primarily responsible for finances and budgeting but all group members should be aware of and understand the basic financial systems – it will be central to group work on the whole. Although building skills in an area not directly linked with community archives may seem daunting, the positive results will be clear to see: a group's message and objectives can be carried out by knowing what resources are available, how these can be best used, what resources are needs and how to go about obtaining what is needed through funding.

Topics

a. Financial Strategy

Although the term ‘financial strategy’ may conjure up some scary thoughts, here we are really talking about assessing your group’s resources. There are a number of reasons for this:

1) Your group will be able to draw up a full list of what resources are available to you and these can be used in the most effective way.
2) You will then be able to identify any resources that are needed or if you have something already that can be used in its place – money will not be spent unnecessarily.
3) Full preparation can be made towards reaching any targets that your group would like to achieve.
4) Any potential risks can be identified and back-up plans can be put in place to help deal with any problems that may arise.
5) If the need occurs for your group to apply for funding, you will be able to properly outline how much you want and exactly what you want to spend it on.

First and foremost, it is very important to involve all group members in any financial strategy work as everyone will have ideas about it. Where specific roles need to be filled, fairly elect the most appropriate members for these jobs. Make sure that everyone understands what is going on and why.

The most sensible way to list and assess your group’s resources is to set up a procedure or system to follow. Think about how to go about surveying and listing your entire group’s resources, how you will identify needs and how you will fulfil these needs. There are large amounts of information out there on best financial practices and expert advice. Often the experience of group members can help to relate this advice to your work and future aims. It is a great idea to get into the habit of setting up systems and following them. It will get easier over time help to tackle any unforeseen problems that may arise.

A large part of financial strategy if the costing of products and services before spending any of your group’s money. There are two types of cost to consider:

<u>Fixed costs</u> – these are costs that won’t change, e.g. room hire.
<u>Variable costs</u> – these are costs that vary with output, e.g. the type of room hired and how long for.
<u>One-off costs</u> – although self-explanatory, these are costs only needed on isolated occasions, which require getting a list of quotes to determine the most value for money.

It is sensible to use word-of-mouth to find businesses and organisations that will not only be cost-effective but trustworthy in the services they provide – it is best to start out within your local area. When you know exactly what it is your group needs, you can then contact reputable retailers or organisations and spend the right amount of money on a worthwhile resource or service.

b. Managing accounts and budgeting

The most sensible and straight forward way to approach budgeting is to try to forecast incomings and outgoings over the next year whilst producing a monthly budget outlining cash flow. There are three steps to managing accounts and budgeting: Preparation, Control and Reporting.

Preparation
The preparation stage of budgeting is where your group outlines its objectives and future plans that they would like to achieve. In simple terms, it is turning plans into pounds. This will usually take the form of a one-year plan or revenue budget.

Your group will first of all need to make a list of any incomings or outgoings that are known about at the start of the year and that will definitely or are highly likely to occur. It is acceptable that some of these will be exact figures, whilst others will be estimates (e.g. our group thinks that there will be £350 spent on travel expenses). As long as any estimates are fully explained and hidden costs are considered, you should end up with a sensible and realistic revenue budget.

There are points to consider when entering the preparation stage of managing accounts and budgeting:

- **Balancing a budget** – decide if the income and outcome should cancel each other out (this should be the case where a set amount of money is to be spent) or whether having an under spend or overspend at the end of the year will be best for your group.
- **Life of a budget** – decide what period of time it will cover. A year is usually the most sensible but give realistic dates, allowing for relevant group members' time (e.g. treasurer or accountant).
- **Changeable format** – a budget must be structured in such a way that it can be altered to reflect any changes that may occur.

However, the main point is to decide on a structure for your budget and stick to it. This way the information will be easy to record and easy to read and analyse at the end. There will need to be separate sections for income and outcome, with columns for different types of spend. Consider that month-by-month totals will not always balance or be the same – some months may be more expensive than others if events are being carried out, and some months will have a higher total perhaps if they are quieter for your group.

Control
Budget control means considering variations in your group's finances and proper book-keeping to monitor figures, amounts and balances.

Book-keeping is a set of summaries of financial activity. It is best to keep this process simple to keep track of the money going in and out of your group's funds. You will need to record receipts, payments and cash balance by having a 'received' section on one side and a 'paid out' section on the other – this can be broken down further into types of payment if needed.

Petty cash amounts will need to be inputted as a lump sum into your group's book-keeping records. A float with a set amount will need to be replenished every so often (usually every month but this will be dependent on what is best for each group). This amount may take a little while to get right so that it is not much high or too low. Keep a record with the float of what the petty cash is being spent on (e.g. T Smith – train fare - £6.40).

There are a number of points to remember when approaching controlling your group's budget:

- Two group members should be chosen to deal with the accounts. This is not to do with levels of trust but it is so any amounts, figures, receipts and payments are double-checked – we all make mistakes!
- Two group members should be chosen to sign any cheques, to help prevent against fraud.
- If your group has a bank account, check the statements against the book-keeping paperwork. It is a good idea to check that figures match and this will prevent against fraud, as it will be clearer if any money has gone missing from the account.
- Check the differences in the revenue budget (drawn up at the start of the year) and the actual budget. Small alterations are to be expected with estimated costs but others will be higher.
- Any differences of 10% or higher in the revenue or actual budget should be looked at. This is by no means a way of finding anyone to blame but will help to identify internal or external factors that may have brought about this difference, how it can be controlled and how it can be prevented or prepared for in the future.

Reporting
It is good practice to get into the habit of reporting on your group's finances at the end of the year. It makes accounts more understandable by turning data and figures into information that means something and reflects your group's performance to its members and wider members of the public (if you decide to publish your report in your newsletter or on your website, for example).

Tying in with other areas of performance, an annual report should look at:
1) What your group aimed to achieve at the start of the year.
2) What your group actually achieved this year.
3) What your group aims for next year.
4) How your group will achieve these aims.

5) How you have measured your successes this year.
6) An outline of the end of year account – Does the final budget match what was forecast? What went well? What did not go well?

A crucial element to producing a report is that changes are made as a result, since assessment is its very purpose to ensure your group functions as best it can.

9. Glossary of terms

Term	Section	Definition
e.g. marketing	6.4	The term used for any promotion of your groups work, individuals, events etc…
Analogue recorders	8.4	Audio equipment used traditionally for oral history projects. Examples include audio cassette and equipment in an older digital format, such as minidisc.
Audience	6.1	Any individual or group that you may have contact with in some way, both directly and indirectly.
Book-keeping	7.2	A set of summaries of financial activity – keeping track of money coming in and going out of group funds.
Blog	6.3	Derived from the term web log, an online journal for both individuals and organisations to share thoughts and opinions with an online community.
Community memories	8.1	A type of memory that can make up oral history based on generalisations or groups' experiences.
Data Protection	4.1	Legislation, which gives a person certain rights to the protection of information held about themselves.
Digital records	8.4	Records that are in an electronic format. Examples include computer files, e-mails, websites, text messages and much more.
Direct memories	8.1	A type of memory that can make up oral history derived directly from personal experience.
Disability Discrimination Act 1995	1.2	An Act of Parliament that makes organisations (although not private members' clubs) responsible for not discriminating against people in respect of their disabilities in relation to employment, the provision of goods and services, education and transport.
Financial strategy	7.1	The process of assessing group resources and funds so that a full picture can be drawn up of group aims and the ways in which these aims will be achieved.
Fixed costs	7.1	Costs that will not change – e.g. room hire.
Health and Safety Executive	1.2	The body responsible for implementing health and safety legislation and giving guidance.
Manual handling	1.2	The action of a person lifting, lowering, filling, emptying or carrying loads – and the proper procedures to do so.
Networking	6.2	The sharing of information and development of professional relationships between people with similar interests and goals.
One-off costs	7.1	Costs that are only needed on isolated occasions.
Open day	1.1	An opportunity for members of the public to attend an

		event and receive a service not usually provided.
Oral culture memories	8.1	A type of memory that can make up oral history from stories that have been passed down, usually in a family or in a community.
Oral history	8.1	The recording of someone's memories and experiences, usually in the style of an interview. It is the recording, preservation and interpretation of historical information based on personal experiences.
Partnership working	1.1	Working together with other groups, organisation or members of the community towards a certain goal – e.g. a public event.
Podcasting	6.3	Audio and visual files that are broadcast and shared over the internet.
Publicity	1.2	Material distributed (leaflets etc) giving information to promote your group and its work.
Profile	6.3	The way that your group is viewed in the local community, or to what extent your work and your group is known about.
Revenue budget	7.1	A one-year financial plan, listing estimated incomings and outgoings.
Risk assessment	1.2	The investigation of potential risks and hazards that may occur, and how likely they are to occur.
Sensitive personal data	4.1	Information about a person that gives the following details: racial/ethnic origin; political opinions; religious beliefs; physical/mental health; sexual life; Trade Union membership; alleged criminal offences.
Service users	1.3	People who use your group – whether this be engaging with people at events, answering enquiries or regular contact with group activities and work.
Skill Base	6.1	The basic skills which either a group or individual already possesses.
'Solid-state' recorders	8.4	A more modern and popular type of recorder used in oral history. These record straight to a memory card or hard drive built within the piece of equipment.
Talking Boxes	5.4	A collection of items and other material relating to a particular theme that can assist in
Transcript	8.3	A written or printed version of an oral history recording or interview.
User consultation	1.3	Involving people in your group by asking their opinions on the work that you do, and discussing/implementing any suggested changes.
Variable costs	7.1	Costs that vary with output, e.g. the type of room hired and how long for.

9. Further Reading

Title	Publisher	Author/s	Section	Details
Health and Safety Executive website	Health and Safety Executive	Health and Safety Executive	1.2	• www.hse.gov.uk
Community Archives website	Community Archive and Heritage Group	Community Archive and Heritage Group	2, 3, 4, 6, 7, 8	• Gives useful advice and guidance aimed at community archive groups on cataloguing, conservation, funding, oral history, publicity and promotion, websites, legislation, digitisation and more! • www.communityarchives.org.uk
Information Commissioner's Office website	Information Commissioner	Information Commissioner	4.1	• Gives advice on Data Protection and Freedom of Information. • www.ico.gov.uk
Finance Hub website	Finance Hub	Finance Hub	7	• Essentially aimed at third sector organisations (i.e. non-governmental and non-profit-making) but has some useful resources for advice and guidance. • www.financehub.org.uk
The Oral History Society website	The Oral History Society	The Oral History Society	8	• www.oralhistory.org.uk
British Library Sound Archive website	British Library	British Library	8	• www.bl.uk/oralhistory
The Journal of The Oral History Society	The Oral History Society	The Oral History Society	8	

The Oral History Review	Oral History Association	Oral History Association	8	
Copyright for Records Managers and Archivists	Facet Publishing	Tim Padfield	4	
Avoiding the Wastepaper basket: a practical guide to applying to grant making trusts	LVSC	Tim Cook	9	
The Complete Fundraising Handbook	Institute of Charity Fundraising managers	Sam Clarke, Michael Norton	9	
Writing better fundraising applications	Directory for Social Change	Michael Norton	9	