



## Guide No. 8      Use and access to records and archives

1. [Closure periods](#)
2. [Sensitive/Confidential Records](#)
3. [Access to closed records](#)
4. [Helping researchers](#)
5. [Copyright and permissions to quote from or photocopy material](#)
6. [Exhibitions and Displays](#)
7. [Further advice](#)  
[Guides in this series](#)

This handout provides advice and guidance on access to the records of Area and Local Meetings and committees. It covers closure periods and sensitive and confidential records and provides advice on allowing researchers to consult records.

### Summary of guidance

- Closure periods applied to records mean that they are closed for research, *not* to officers of a meeting.
- Records are closed to comply with legislation; to protect the work of the Society; to protect individuals and families; and to protect records.
- Files containing personal information must not be made available to a researcher. (Data Protection Act 1998)
- If a meeting is depositing records with a repository, the terms of deposit should include closure periods where applicable.
- Requests from researchers for access to records should be in writing. They should provide a letter of introduction or reference and should make an appointment to consult the records.
- Researchers should be supervised at all times. They should leave their bag away from the records and use pencils or a laptop. Food and drink should not be in the same room as the records and records should never be lent out of the meeting's custody.
- Area Meetings hold the copyright in their records and unpublished documents, and any requests to make copies or reproductions, or quote from documents by anyone other than the meeting will require the permission of the meeting.

## 1. Closure periods

Closure periods applied to records mean that they are closed for research, *not* to officers of a meeting. Records are closed for many reasons:

- to comply with legislation, in particular the Data Protection Act 1998 which protects information about *living* individuals. Files containing this kind of information must *not* be made available to a researcher. (For further information about the Data Protection Act, see *Guide No. 3 Legislation affecting records and record-keeping*).
- to protect the work and interests of the Religious Society of Friends. Witness work means that the Society and its members work in sensitive areas and records of this work can hold much sensitive information. Disclosure of information may prejudice present and future work or jeopardise the safety of those involved or referred to.
- to protect individuals and their families. Records can contain personal or confidential information and disclosure of this information may jeopardise the privacy of individuals or their families and may cause distress or embarrassment and constitute a breach in confidence.
- To protect the record. Irrespective of their age, some records have to be closed because they are in a fragile state and are liable to be damaged further through use.

It is the responsibility of Area Meetings to decide which records shall be available to researchers, whether Friend or non-Friend, and to stipulate the conditions for their release. Many meetings make available records more than 50 years old, subject to exceptions where particular discretion is needed, e.g. overseers' minutes. (*Quaker Faith and Practice*, §4.44)

## 2. Sensitive/Confidential Records

Many Quaker records contain personal and sensitive information, ranging from membership applications to information about a sensitive area of work Friends are or have been involved in. Potentially sensitive areas in Quaker local records include:

### Area Meeting membership records

Minute books or supporting papers which contain applications for membership (including visitors' reports) and correspondence on resignations and other terminations of membership should be closed. These records are covered by the Data Protection Act and should remain private to officers of the meeting for at least the lifetime of those concerned.

### Nominations Committee records

These records may contain reports concerning Friends considered for service in the Society, or elsewhere, and should be closed. These records are covered by the Data Protection Act and should remain private to officers of the meeting for at least the lifetime of those concerned.

### Elders' and overseers' records

Minutes, correspondence and other documents concerning overseers' pastoral care within a meeting should remain private to officers of the meeting for at least the lifetime of those concerned. They are covered by the Data Protection Act.

### Financial and treasurers' records

These records include financial contributions, donations, schedules and analyses. If they record personal transactions between members and a meeting, they are covered by the Data Protection Act and should be closed for the lifetime of those concerned.

### Premises Committee records

Minute books and other records may contain personal references to wardens or caretakers, and transactions with contactors, which may be sensitive and may require a longer period of closure than 50 years.

## **3. Access to closed records**

As mentioned above, meetings should decide which of their records are available to researchers and should have a clearly understood procedure for dealing with requests for access to closed records. A Friend writing a history of a local meeting will present no difficulty, but a non-Quaker researcher who asks to see all the applications for membership for the last 30 years should not be given access without very good reason.

If a meeting is depositing records with a repository, the terms of deposit should include details of closure periods and access to closed records. See *Guide No. 9 Depositing archives with appropriate repositories* for further information.

## **4. Helping researchers**

Quaker records are being used more and more for research by Quakers and non-Quakers alike, particularly with the growth of interest in family and local history.

Where records are retained in the immediate care of a meeting and are required by a researcher, the meeting will need to make a judgement as to which, if any, of the records it wishes to make available and should employ the following rules if access is granted:

- Requests for access to records should be made in writing to the Custodian of Records, either by email or letter. Requests should make it clear which records are required and for what purpose.
- Before agreeing to a request, ask the reader for a letter of introduction, or reference from their supervisor or lecturer, or from someone who knows and understands their research topic.

- Researchers should make an appointment to visit and should provide proof of identification which gives their address.
- Researchers should be supervised by a member of the meeting, who should remain with them all the time, without exception.
- If possible, have a table in a lighted area for them to use.
- On their arrival, it is not unreasonable to ask a researcher to leave their bag away from the documents they are using and to have on the table only what they need.
- Only pencils should be used or a laptop computer for taking notes.
- No food or drink should be allowed in the same room as the records.
- Never lend records to an individual to take away.

These rules are adapted from the standard practices found in archives search rooms and local record offices. All are reasonable procedures to protect records from damage and loss and any researcher should not be surprised at them.

## 5. Copyright and permissions to quote from or photocopy material

An Area Meeting holds the copyright in their records and unpublished documents, and any requests to make copies or reproductions, or quote from documents by anyone other than the meeting will require the permission of the meeting. This applies to all forms of reproduction from photocopying to photographs, microfilms, digitisation and scanning.

Researchers often ask to take copies of records. The taking of photographs, using a digital camera or hand-held scanner, should not be allowed without signed agreement that the images are for private use only. They should provide the meeting with a list of documents photographed. Researchers should be advised that allowing copies to be made for private use does not imply permission to publish. If the images are to be used in a publication or for commercial purposes, then the meeting will be able to charge a reproduction fee if it wishes.

Commercial micropublishers may offer to film and market older records, paying the meeting a royalty in return, and often giving the meeting a free copy. Similarly, some meetings have been asked to allow some of their records to be digitised or scanned as part of an on-line resource project, such as archives digitisation or a local history website. Meetings should contact Friends House Library for advice.

In all instances any reproduction should include an appropriate acknowledgement of ownership or statement of permission. For example, Friends House Library asks that these standard acknowledgements are used:

- when quoting from manuscripts: *Religious Society of Friends in Britain*
- when reproducing a picture: *Reproduced with permission of the Religious Society of Friends in Britain*
- when using material owned by the Yearly Meeting: *Copyright of Religious Society of Friends in Britain*

For details of the Copyright, Designs and Patents Act 1988, see *Guide No. 3 Legislation affecting records and record-keeping*.

## **6. Exhibitions and Displays**

There is a separate guide which deals with creating and managing exhibitions, see *Exhibitions and displays of records, archives, books and printed materials*.

## **7. Further advice**

For further advice on managing records and archives you can either write to Friends House Library, Euston Road, London NW1 2BJ, telephone 020 7663 1135 or send an email to [library@quaker.org.uk](mailto:library@quaker.org.uk)

## **Guides in this series**

- Guide No. 1 The job of the Custodian of Records
- Guide No. 2 Meetings' records and their retention and disposal
- Guide No. 3 Legislation affecting records and record-keeping
- Guide No. 4 Creation to curation of records
- Guide No. 5 Minutes and supporting papers
- Guide No. 6 Electronic records
- Guide No. 7 Preservation and storage of records and archives
- Guide No. 8 Use and access to records and archives
- Guide No. 9 Depositing archives with appropriate repositories
- Guide No. 10 Disaster preparedness
- Guide No. 11 Creating exhibitions and displays
- Guide No. 12 Records equipment and suppliers
- Guide No. 13 Glossary
- Guide No. 14 Frequently Asked Questions

All guides can be downloaded from the Britain Yearly Meeting website [www.quaker.org.uk/Library](http://www.quaker.org.uk/Library) on the Support for Meetings page or requested from the Library.

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