

## Guidelines for Methodist Archivists

### Introduction

These guidelines are intended for those appointed to be District Archivists, under Standing Order 473, or Circuit Archivists, an office at the discretion of the Circuit Meeting.

The role of Methodist archivists is primarily to ensure that Methodist Church records held by Districts, Circuits and individual churches are adequately and suitably administered, whether they are held in the Circuit safe, vestry, an officer holder's computer or in the local Record Office. We keep records to help us make future decisions, prove that we have done the right thing, and that we are acting according to the law. But they also allow current researchers and future generations to understand what Methodism was about, what Methodists did, and why they did it, so you might find that part of your role is to help people interested in Methodism in your area find out more about it. Which is also very important in the life of the church.

Online guidance on all the key points may be found at <http://www.methodistheritage.org.uk/archives.htm>

### Appointment

If you are a District Archivist, your appointment will be made by Synod under Standing Order 473. You will note that this signifies that you are dealing with property: we will come back to that later! It will be useful if the post gives you a seat on Synod: Districts vary in their practice on this point.

The Circuit Meeting should appoint circuit Archivists. You will then be an *ex officio* member of this meeting. The appointment of a Circuit Archivist is not compulsory for the circuit and the post is not recognised by Standing Orders, but the appointment is to be encouraged. The six-year rule is not applicable to such appointments.

### Contacts

The important point is that you should receive a copy of the Synod or Circuit Directory, so you know whom to contact.

Once appointed, you should ensure that the Methodist Heritage Officer has your contact details. This will mean that if any enquiries relating to your District or Circuit are received at Methodist Church House, they will be passed onto you. There is an Archivists Network, which holds training events twice a year, to which you will be invited. There is also a Liaison Officer for Methodist Archives, who may be contacted for specific advice via email at [archives@methodistchurch.org.uk](mailto:archives@methodistchurch.org.uk)

Whether you are working across the District, or at Circuit level, making contact with the staff of your local Record Office is important. According to Standing Orders, it is the District Chair or the Circuit Superintendent who have responsibility for ensuring that our records are kept and for depositing them at the appropriate moment. On the other hand, if they had time to do this the church would not have created the posts of District and Circuit Archivists. Unlike them, you are not required to move to a new area every five years. Ensure you have a good working relationship with District staff and Superintendents, and also with the District or Circuit Administrator. This will allow you to ensure that you are the one the Record Office staff regard as the contact: the person they tell when our records have been accessioned, or when they want to make use of our records in an exhibition, for example.

## **Records**

As Methodists we are famous for our meetings, and the records generated. These are the ones you will probably find:

### ***Circuit records***

- Minutes of circuit meetings (and their predecessor Trust and Quarterly meeting minutes)
- Circuit and missionary accounts
- Minutes, accounts and reports of all circuit committees and associated groups, youth organisations, day schools
- Statistical returns
- Records of ministers, local preachers, manses, burial grounds
- Circuit plans and directories
- Circuit magazines and newsletters
- Correspondence files

### ***Local church records***

- Minutes of Church Council meetings (and their predecessor Trustees' and Leaders' meetings)
- Appointments and resignations
- Accounts, minutes, reports of all meetings and associated groups (e.g. Sunday school, youth and uniformed groups, Wesley Guild, etc.)
- Deeds of churches and burial grounds no longer owned by the Methodist Church as well as church closure and sale papers
- Property and other schedules
- Seat and pew rent registers
- Memberships lists and class books
- Collections and envelope schemes
- Baptism, marriage and burial registers
- Papers and plans/drawings for buildings, extensions, modifications, property/artefact insurance
- Pulpit notices
- Church magazines and newsletters
- Notices, posters and orders of service for all special church events
- Correspondence files

Special care is needed when churches close to ensure that as many records as possible are immediately collected for depositing. Contact with past and present members may help to extract records that might otherwise be lost to Methodism. You should try to take action as soon as the intent to close is confirmed and active worship ceases.

Should you come across any early material (i.e. pre 1800) please take advice from the Methodist Heritage Officer or Liaison Officer for Methodist Archives. Some material may have a wider significance and be more appropriately deposited in a central location. You should also consult about sound or visual recordings: there are specialist archives for this sort of material.

### **Collecting records**

You should encourage members of every church in the circuit to be vigilant in identifying all records that are available to deposit. Encourage searches in safes, cupboards, spare boxes and apparently unlikely places for discarded and stored records.

You should arrange to address Synod or the Circuit Meeting periodically about the importance of records being passed on to you rather than staying in local hands where fire, damp, decay due to atmospheric and unstable environments and insufficient ventilation, insect or mammal attack, and risks of destruction by the uninitiated are high.

Emphasis should be placed upon the fact that **all Methodist papers and other records are the property of the Methodist Church** and not of individuals however much they or their ancestors and relatives may be mentioned in the records or have been involved in the church in the past. It is illegal for individuals to hold on to records which should be deposited. Tact is required in this matter because a person may have come to regard the church and its records as a personal responsibility. They have to be persuaded that parting with items they value personally is their duty as Methodist Church members.

### **What to deposit and in what form**

We want to ensure that the story of the church is told, but we can't keep everything! Every member of a particular meeting will have copies of the agenda, papers and minutes, but one set, the ones signed by the Chair, is the one that requires preserving. Our Standing Orders, and government legislation, require us to keep some records in the Circuit safe, or in the Church office for particular periods of time. Elsewhere on the Methodist Church website you will find the current guidance on what should be kept for how long, and whether those records then need to be preserved in a Record Office for ever. The link to the retention schedule is here: <https://www.methodist.org.uk/media/30598/retention-schedule-010923.pdf>

Standing Order 015 tells you what must be deposited.

It is sometimes necessary to weed what we have, so we have a series of regular snapshots. One of those is for Circuit plans. Once every five years we send copies of all plans for a particular quarter to the Methodist Archives and Research Centre at the University of Manchester

Before you go to the Record Office carry out a basic examination of what you have, and weed it according to the guidelines mentioned above. If you have any doubts about how much to weed,

please contact the Liaison Officer for Methodist Archives (email above) or talk to the archivists at your local record office. Standing Order 015 covers this by stating that we deposit material “deemed worthy of permanent preservation by the district archivist and recipient archivists”.

This process may well lead to you having an amount of confidential waste, which will require shredding. Use the Circuit or District office shredder if possible.

If someone has written a book about a Methodist subject and collected materials, these may be deposited as a file, although it would be good practice to separate out any official records they have used.

Displays are a popular and effective way of telling our story, but not something that a record office or museum would be able to accept. If a booklet has been made to accompany the display, then these should be deposited. If the display was of original records and photographs these items should be deposited (if they haven't been already). You might also wish to preserve this material by digitising the items involved, or creating a website – or by contributing to the community archives (My Methodist History, My Primitive Methodist ancestors, My Wesleyan Methodist ancestors).

### **Preparing material for deposit**

- If you can provide a basic list of the records you are depositing, you will be warmly thanked and it will probably mean that the Record Office staff list the records sooner rather than later. Records often fail to quote the name of the church or date, so you should attempt to ensure that the church denomination (Wesleyan, Primitive Methodist, United Methodist), the church name, the circuit and the date of the record are added before the records are deposited. Remember that you understand Methodism far more than the Record Office. If there any particular facts you think it would be helpful to record (e.g. these minutes cover the period of a major development, or these records include important information concerning Joe Bloggs who was famous for...) then add a note. Make sure you have a copy of any notes about the provenance and context of the collection
- If it is appropriate add notes to your list concerning any damage you are aware of.
- Put slips in each of the books or files linking them to your list, or stating what each item is.
- Make sure any photographs that can be identified have the information written on the back in pencil.
- All notes must be made in pencil only.
- Do not attempt any major conservation work, as this is best left to a trained conservator, but do follow the following basic guidelines.

- Documents and letters can be stored loose within boxes or enclosures, wrapped in bundles, tied with tags or bound into volumes.
- Folders containing loose-leaf papers can be confusing. If it is possible, put the papers in order and into labelled folders.
- Do not attempt to flatten documents, especially parchment.
- Remove papers from any lever arch files, folders and plastic pockets, as these take up a lot of space, but also may decay and damage the contents. Be sure to record any relevant information from the covers or spine, in pencil, on a covering sheet of paper.
- Carefully remove elastic bands, coloured cotton or linen tape, string and metal fastenings. If you can remove any staples without causing damage, do so. They may be replaced with brass or plastic paper clips, protected by an acid free paper tab.
- Do not remove adhesive tape, as you may damage the records in doing so. Do not attempt any repairs using adhesive tape.
- Remove the records from containers such as plastic bags, cardboard folders and anything but clear polyester wallets and sleeves.

### **Electronic records**

There will be particular problems with electronic records. Although most organisations have them, their preservation tends to be handled within the organisation, rather by the network of record offices. It is important to remember, however, that what matters when deciding whether to retain records is the content and purpose of the record. The fact that a record is electronic does not change the length of time we need to keep it or the need to preserve it permanently if that is what we would have done with a paper copy.

Your first step should be to consult with the record office on which formats they will accept.

At the moment it might be wise policy to make a paper copy, and deposit that. For digital preservation, Word processed documents may be saved as text files or PDFs. Text files preserve the text of the document but not the formatting, whereas PDFs preserve the appearance of the original document. Text files are, however, a particularly stable and reliable data preservation format.

Excel documents can be saved in comma-separated values (CSV) format. This effectively saves the spreadsheet as a text file, with each new line defining a row, and commas separating the values in each column. It should be noted that some information, such as the formulas used to make calculations in the spreadsheet, would be lost by saving in CSV format.

As with paper records, most electronic records should be **destroyed** after an appropriate time period, rather than being stored indefinitely. Just like paper storage, electronic storage costs money and there is the added complication of making sure that the records remain readable as new software is adopted.

Although deleting information from computers is relatively easy compared to destroying paper records, please note that simply deleting a file will not necessarily prevent it from being recovered by an expert user. Before throwing away any computer hardware it is therefore important to completely clear the hard drive, and (for added security) physically destroying it.

It is important to remember that email is a form of documentary evidence and can be admitted to court in the same way as other forms of documentary evidence. When deciding how to manage the emails which we need to retain as a record of the work of the Methodist Church, you must weigh up the consequences of losing the email in its original format. When saving an email it is always important to retain details of the sender and recipients. If, however, an email is likely to be required as evidence, perhaps in a legal dispute, no longer having the email in its original format may mean that its reliability (or even its admissibility) is subject to question. We deposit records that are no longer required for daily business, but it may be necessary to carry out a risk assessment with the Circuit or District Office before printing out emails for deposit.

Further guidance will be provided on the Methodist Heritage website concerning the preservation of electronic records in house.

### **Record Offices**

Records should be deposited in the Record Office covering the area in which the main church of the circuit lies. Unless you are dealing with a new Circuit, the decision of where to deposit will have already been taken. See the list at <http://www.methodistheritage.org.uk/research-circuitarchives.htm>

If Circuits merge the District or new Circuit will need to make a decision on where to deposit in future, although as Standing Order 015 reminds us we do not allow anyone to look at our unpublished records for 30 years, so you do have some time in which to make a decision.

You may also find that Record Offices move, either as local government is reorganised or money is found to improve facilities. If this happens, please remember to tell the Liaison Officer for Methodist Archives, so the guide to the location of Methodist archives remains accurate.

It is good practice to contact the record office before you arrive, to ensure that they know you are coming. If you able to email them a list of what you intend to deposit that will also help them prepare.

When you deposit the records, please make it clear that you are doing so on behalf of the Methodist Church and that as District or Circuit Archivist you are authorised to do so. Ensure that you are given a receipt for documents, which you must retain. You may be asked to sign a deposit agreement, if this is a new arrangement. This is normal practice: the connexional archives are covered by similar agreements. The Superintendent Minister, however, should sign any agreements. Once deposited, the only person with the authority to withdraw the records is the Super (or Chair of District).

The agreement will cover the terms and conditions of the deposit, and what the Record Office may do with the records, as well as the right of the Church to remove the records. Standing Order 015 sets out the standard period of closure. Unless a record has been made public (e.g. it is a notice that was on a wall, or a printed booklet given to people who were not members of a meeting) then we do not let members of the public see it for 30 years. If the record contains confidential information, the closure period is 75 years.

Once a record has been made public, especially if it relates to family history, researchers may want to make a copy. Their right to do so is covered by copyright legislation, and it is best to agree that the Record Office looks after these processes. If someone wishes to publish one of our records, in which the Church has copyright, the Record Office will refer them to the Church. Copyright in all Methodist materials is vested in the Trustees for Methodist Church Purposes (TMCP). All record offices were advised this was the case in 2014, and that permission should be sought from TMCP by contacting Methodist Church House. If you, or the Superintendent concerned, receive a request of this nature, please forward it.

In the case of popular records such as the registers, the Record Office may suggest that they be microfilmed or digitised in order to prevent wear and tear to the originals. Please refer such requests to TMCP, who will give formal permission and handle any issues relating to rights. In general we usually agree to any suggestions which are beneficial to our interests.

Most record offices have a backlog when it comes to listing deposits, so it would be wise to keep a copy of your initial list of what has been deposited.

Many record offices are required to justify their existence these days. This will impact on us in that the office will give priority to work that will increase use of the facilities they provide. These priorities are often driven by what users are asking for, so if there is no perceived need to have our church records made available quickly, they won't be. You may need to encourage people to go to the record office and use our records.

Many record offices are also keen to involve volunteers in their work. You, or a group from the church, circuit or district may wish to offer to work on a Methodist project with them.

Most record offices accept printed documents and manuscripts, and some will now take in electronic records. Photographs are usually accepted, although any information you can provide on these when depositing will be gratefully received. As has already been noted, other formats may need to go to more specialised archives, or museums. Advice on artefacts (objects, pictures, plaques, war memorials, banners and flags) will be provided elsewhere on the Methodist Heritage pages.