

# Collections Policy for Oakham School Archives 2019

## 1 INTRODUCTION

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The Oakham School Archives, hereafter Archives, is located in The Barber Rooms, College House. It derives its authority to collect, preserve and make available archives from this policy statement, adopted formally by the Trustees of Oakham School. The Archives were officially set up in 2010. Beforehand, there was no official service and archiving and staff volunteers on an ad hoc basis undertook collecting. An official archive was set up to ensure proper security of the material as well as enabling collecting of material from Old Oakhamians and other sources. Peter Lawson, OO and Chairman of Trustees, provided considerable support.

Previous volunteers made up of ex members of staff and Old Oakhamians including Brian Needham, Roger Blackmore, Nigel Webb, Kate Williamson, Roger Anderson, and Michael Allbrook.

The Archives currently holds a wide variety of materials relating to the history of Oakham School dating from the 16<sup>th</sup> Century.

This policy has been created in order to update the previous collections policy, but additionally, it will layout future collecting plans, enshrine the values to which the archive is committed to and highlight the method of working within the archive.

This paper relates to the following documents:

- The Archive's mission statement and values.

## 2 STAFFING

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The Archivist (part time) is hired externally and reports to the Head of Smallbone Library and Archives, hereafter Head of Library.

The first professional archivist was hired in 2018 to manage and improve the existing collections and catalogue, and to expand upon the archive's educational outreach and digital possibilities. Previous archivists had been volunteers selected by the Headmaster and the Head of Library.

An assistant archivist (part time) who works identical hours, supports the Archivist. In addition, there is the help of the honorary assistant archivist who is an unpaid volunteer. The archivist will manage the work and time of any staff underneath him/her.

We hope to expand upon our volunteer base by including volunteers from the school and also from local universities.

### 3 MISSION STATEMENT AND VALUES

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Oakham School Archives exists to collect, preserve and make accessible documents and objects that illuminate to the school's pupils, staff, and the wider community, the history of this establishment.

We will collect, catalogue, and store material to industry standards in order to ensure the archive's long-term preservation. In order to achieve this, we are keen to embrace new technology and continually develop our skills and practices.

The archives strives to ensure accessibility to all including researchers, current and past students and genealogists.

We aim to exhibit material regularly through a variety of mediums and collaborate with external archives, museums and library services in order to help deepen the public's understanding of the role and history of Oakham School. We desire for the archive to be enjoyed by the many and thus outreach activities will be a core part of our service.

We strive to integrate our archives within the teaching of the school to expand upon the classroom material but also to stimulate an intellectual curiosity within the pupils. We want to ensure that the archives are a place where pupils can come and experience working life through volunteering/ service placements. Through these two avenues, pupils will develop key skills needed to succeed in their studies and careers. To achieve this, we will participate in a multitude of outreach activities including exhibitions, classroom material, displays, social media and publications.

One of our aims is to strive towards becoming an accredited archives service. As such, developments and projects that we undertake will be influenced by accreditation standards.

### 4 STATEMENT OF PURPOSE

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The Archives is the final repository for the historical records of the School. Its primary purpose is to document the history of the School and to provide source material for staff, students, alumni, and other members of the School community, as well as scholars, authors, and other persons interested in the history of the School and its place in history. As such, it seeks to complement the School's overall educational, cultural and charitable aims.

With this in mind, the Archives seeks to acquire, and to make available for research and as a learning aid, records and artefacts worthy of permanent preservation relating to the history of the School. This includes the following categories:

- Records of the School, its governance and its activities – This includes but is not limited to Oakhamian magazines, red books, cash or accounting ledgers, photographs of the school, marketing material, event programmes, costume, and headmasters papers.
- Records of the Old Oakhamian Club – This includes but is not limited to records of events for the Old Oakhamian Club, copies of the Old Oakhamian magazine, and memorabilia connected to the club.
- Records of alumni, trustees, staff and ex-staff with relevance to the history of the School - This includes but is not limited to photographic material of staff and pupils, trustee booklets,

meeting minutes, work of ex-members of staff, correspondence, and publicity material in local, national or international publications.

Records are accepted in every format, including but not confined to, manuscript, printed, digital and audio-visual, providing the Archives has resources to preserve them over time.

## **The Collection**

The collection has several key strengths which we are keen to continue collecting material for.

- Oakhamian Magazines and Red Books
- Sporting, house, school and activity photographs.
- Photographic material of the school.
- The Peter Witchell music collection.
- School costume.
- Headmaster information.
- Records of Old Oakhamians, staff, the Old Oakhamian club, and trustees of the school.
- Sporting memorabilia of the school.
- Reminiscences of Old Oakhamians

We would love to acquire and develop our collection in the following area:

- Academic archives from the school (e.g. pupil's works and lesson material)
- Teachers and teaching at the school

The majority of the collection consists of paper records however there are several collections, which include audio-visual material, costume, metal objects (such as trophies) and a significant photographic collection.

The collection has previously been organised via theme rather than true fonds from a person, organisation or event.

## **5 COOPERATION WITH OTHER REPOSITORIES**

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The Archives does not seek to compete with other repositories for archives and will endeavour to avoid conflict and duplication of effort. We will seek to communicate with external repositories should any conflicts arise. Partnerships will be sought should material be of benefit to the school and archive's educational and outreach aims.

The Archivist has discretion to make loans to other repositories, subject to appropriate recorded conditions. Loans can only be made after consultation with the Head of Library.

## 6 METHODS OF ACQUISITION

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Archives may be acquired by donation, bequest, or transfer from other School departments. Items may also be accepted on loan, provided that the terms of the loan are clearly understood and agreed. Archives may be purchased if they are exceptional items. For acquisition by donation, all accessions must have a legally binding acquisition agreement that sets out the details of transfer of custody, copyright and ownership.

## 7 CONDITIONS OF ACQUISITION

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For an acquisition to be completed, an acquisition form will need to be signed by the donor in which it will confirm the legal transfer for ownership to the archives. Additionally, the form will confirm the transfer of any copyright or intellectual claims to the item and is informed of the potential use of the items.

Archives are accepted subject to the following conditions:

- There is clear and valid title of ownership.
- The items are in the judgement of the Archivist of sufficient quality for permanent preservation.
- Items can be stored in accommodation suitable to their preservation.
- Cataloguing to facilitate research and public access can be completed within a reasonable timeframe.
- Items can be made available for public access immediately upon either completion of cataloguing or, where sensitive data is involved, at the expiry of a specified period. This includes the digitising of items, which will be kept on school servers and published online (subject to suitability).
- Items within a collection, which are found to duplicate those already, held by the Archives or not to be directly related to the School may be disposed of in an appropriate way.
- In the case of bequests, the School reserves the right to dispose of the items in an appropriate way rather than accepting them into the Archives, where that is legally possible.
- Items are in a hygienic condition and not too fragile to be handled, or can be restored to such condition at a cost acceptable to the School at the time of proposed acquisition.
- Items are not going to be used for periodical events such as Foundation dinners and sporting competitions.

### **Duplicates**

Duplicates are only accepted into the collection if they are unique. We define this as having marks or annotations by the owner and that these are of interest for researchers or for educational purposes.

If this is not the case but the duplicate is in a better condition than the existing item in the collection, they shall be exchanged.

If simply a duplicate of material that we have, it will be disposed of confidentially and in an appropriate way.

### **Digital Material**

Digital material will be acquired on the basis that it can be made available for consultation like physical records. They are subject to the same acquisition principles as physical items.

### **Data protection Act, GDPR, and Freedom of Information**

On acquisition of an item which contains personal information, it will be determined whether the archives is the sole data controller. Should items be given to the archives on loan, it will be agreed at the point of acquisition, in writing, who the data controller for the items are.

An eight year rule will be imposed upon the most recent material due to the concern for child protection. After eight years, it will be reasonable to assume the child has passed the age of 18 years old and therefore considered an adult.

### **Publication of New Acquisitions**

New acquisitions will be recorded on the accessions spreadsheet. Termly, a report will be circulated to the archive's committee – in which sit key internal stakeholders, highlighting the previous year's accessions.

## **8 DISAGREEMENT PROCEDURE**

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In the case of disagreement, concerning an acquisition between the putative donor and the Archivist, the matter will be referred to the Headmaster, via the Head of Library, whose decision shall be final and in consultation with the Chair of Trustees.

## **9 ACCESSION**

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The accession process requires appraisal and sometimes, the possibly of combining a new item with existing collections which have been based upon theme. Items will be given a description for the catalogue, and allocated suitable storage and item number identification code.

A separate form will be completed upon agreement of acquisition, which will note down any restrictions on the material, quantity donated, condition, date, and donor (and donor information).

Items will be given a unique accession number, which will be ultimately noted within the catalogue. All information recorded on the accessions sheet will be uploaded into an accessions spreadsheet. This process is key in capturing information about the items as they first enter into the archive's care.

## **10 DISPOSAL**

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Material is acquired upon the meeting of the criteria outlined under conditions of acquisition. Therefore, it will be acquired on a permanent basis.

Previous accessions had not been appraised in the same process.

The archives reserves rights to review its collection and assess items or collections relevance to its aims or overall collection. If agreed that the item is no longer of relevance, then an exploration into deaccessioning or disposing the object will be begun in accordance with The National Archives' *Deaccessioning and Disposal: Guidance for Archives Services, 2015*.

The archives will not sell any material that it owns and deaccessioning will not occur as a result of budgetary or storage constraints.

Any deaccessions will be noted in a register and relevant stakeholders will be made aware.

Disposal of items from the Archives is at the discretion of the Archivist, and where in doubt subject to final approval by the Head of Library.

## 11 LOCATION

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The location of items and collections will be noted at all stages in order to ensure maximum accessibility and search ability. When empty, the archives room and store will be kept locked.

## 12 STORAGE

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Items are currently stored within wooden shelving cupboards/ shelves. Some are in archival grade boxes, however a significant amount are currently in office file boxes. In the coming years, the archive is committed to improving and expanding its storage capabilities, including replacing unsuitable packaging material with archival grade, acid free replacements.

Relative humidity and pest management are currently monitored and recordings kept on a conservation spreadsheet. Blinds are kept closed and lights are kept turned off if the rooms are unoccupied. As part of the archive's commitment to better storage, a lux and thermometer will be purchased as well as exploring possibilities of installing UV filters on windows.

## 13 PRESERVATION

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In order to preserve material, the archive is committed to:

- Undertaking storage condition monitoring (RH, temperature and light levels).
- Pest management.
- Undertaking minor, preventative conservation procedures should the member of staff be trained and confident in the procedure.
- Ensure that the environment and storage is cleaned regularly.
- When possible or appropriate, produce facsimiles for use in events and displays.
- Ensure that staff, volunteers and visitors to the archive respect handling requirements and preservation measures such as the wearing of gloves (when necessary), use of snake weights and book rests, and restrictions on flash photography.
- Seeking specialist advice and training to ensure better techniques in preserving material.

## **14 DISASTER MANAGEMENT AND PREVENTION**

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The archives will work with the estates department of the school to ensure that any situations that arise are dealt with swiftly.

The archives will also produce a disaster management plan which will lay out procedures for various events.

## **15 THE ARCHIVES CATALOGUE**

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The archive's aim is to produce a catalogue entry for all items within its collection down to item level where possible.

Currently, the archives catalogue is maintained on Filemaker, a piece of software created and maintained by the school's IT department. It is only available on networked computers to those who have access (which are currently the archivist, assistant archivist and honorary assistant archivist). Current descriptions are only to a file level and there have been some inconsistencies with record keeping. Digital items are not necessarily linked up with their physical counterparts.

Work is underway to produce a new catalogue which upholds the General International Standard of Archival Descriptions (ISAD(G)). The new software, ATOM, has been chosen by the archivist.

A preliminary box list of all items to item will be produced and then used as the foundation of the new catalogue. We aim to have the box list finished by the Summer of 2020.

All digital and physical items will appear on this catalogue, addressing the shortfall of the previous catalogue. Digital items will also have their file location noted.

The archivist will be responsible for maintaining the catalogue, allocating tasks to staff and volunteers which best represents their skills.

The Archives of the school is committed to keeping good documentation of the collection it holds through accessioning data and an ISAD standard catalogue. Such an approach is the basis of all good collections management which will, in turn, offer greater access to the material, thus fulfilling the archive's outreach and educational aims. We will ensure that collections metadata is kept up to date and make a continual effort to improve upon the information that we currently hold.

### **Publication**

The catalogue will initially be published on a server so that the school community will have access to it. Once more established and more detailed catalogue entries have been added, then the catalogue will be made public and available to be searched by anyone on the internet. This will be done through the school's website.

Digitised items will be checked against the school and archive's data protection and copyright policy before being published in the online catalogue.

### **Back up**

Copies of the box list and new catalogue will be backed up on separate drives on the school system.

Any documents that contain personal information will be password protected.

## **16 ACCESS TO THE ARCHIVES**

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Archives may be viewed by appointment only with the Archivist who will arrange such supervision and assistance as deemed appropriate.

Appointments should, where possible, be made well in advance.

Permission to view records considered by the Archivist to be sensitive and/or problematically recent may maybe granted at the Archivist's discretion who, if in doubt, will consult the Head of Library and, if necessary, the Headmaster. This will be considered against the school's and archive's data protection policy and archival restrictions on information such as medical records.

A few items which are of exceptional rarity or commercial value, or which, for one reason or another, should not be handled frequently, may be available only in the form of a digital image accessible from the online catalogue.

Users of the Archives are required to sign the agreement to abide by the Rules of the Archives (see Appendix), which include rules concerning photography, photocopying, etc., and use made of such reproduction.

Reproductions of any material will be done in accordance to copyright law as well as basing any decisions for scanning material on an item's physical condition.

## **17 PUBLICITY OF THE ARCHIVES**

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The Archivist will arrange publicity of the Archives in collaboration with all relevant parties with the following objectives in mind:

- To encourage its use, especially as a learning aid.
- To further its cultural and charitable aims.
- To encourage donations.
- To stimulate financial support for the School and for the Archives.

### **Social Media and Publications**

The Archives will maintain both a blog (on the school's website), as well as an official Twitter page. Additionally, the archives will maintain a section within the Oakhamian magazine.

### **Displays**

The archives is committed to producing fun and informative displays with the use of archival material. These displays will mainly be located in the school's reception and library. Original items may be used in displays should they be deemed in a good condition and that the display environment is suitable.

Material will be regularly exchanged to prevent any degradation to items.

Exposure to light and UV will be minimised as much as possible including the use of UV film, covers and the turning off of lights should rooms not be in use. Items will be given suitable stands or rests



in order to support them. Pages within books may be turned within the lifespan of an exhibition in order to prevent excessive fading to one section or page.

Records will be kept for how many times items are used for displays.

### **Education Material**

Material will also be used as part of the school's educational activities. Material provided will mainly be digital or facsimiles in place of the originals. When originals are used for education purposes, an archivist or assistant archivist will be present to ensure good handling.

### **Events**

The Old Oakhamian foundation regularly puts on events for alumni and frequently, archival material played an important part. In light of concerns with the preservation of material, especially in an environment with drink, food and high light, temperature and humidity levels, only facsimile material will be provided for these events.

## **18 RELATED COLLECTIONS**

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There exist, for historical reasons, certain collections which are not, strictly, part of the Archives, but which have traditionally been under the management of the Archivist or of the Head of Library.

### **Related collections owned by the school in external locations:**

- Material relating to local and more general archaeology and history, currently mostly on loan to the Rutland County Museum.
- A coin collection, on loan to the Rutland County Museum.
- The Special Collection of Books, which includes a small antiquarian local history section on loan to the Rutland County Museum.

### **Related collections not own by the school in external locations:**

- Items relating to the 17th and 18<sup>th</sup> century history of the school can be located at Uppingham School archives.
- The Rutland Country museum cares for the Matkins collection which contains material concerning the history of the school.
- A large amount of material is located in the Leicestershire and Rutland County Record Office.

### **Date of policy**

This policy is valid from 15<sup>th</sup> May 2019

This policy is due for review in 2021

Written by Charlotte McCrory

## 19 APPENDIX: RULES OF THE OAKHAM SCHOOL ARCHIVES

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Wash your hands before you start working.

Do not to lick your fingers when turning pages.

Handle documents carefully; when handling photographs, hold them by the edges and avoid touching the printed surface.

Keep the documents in the order in which you received them.

For making separate notes, use a pencil only.

If taking digital photographs, scanning, or downloading archived images, note that they may not be reproduced in any publication without the permission of Archivist and due acknowledgement of the source.

*I agree to abide by the above rules.*

*Signed:*

*Full name and address:*

*Date:*