



Volunteer Handbook

November 2020



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This handbook was developed in consultation with Gloucestershire Archives volunteers, partners and staff.

SECTION 1 – Who we are

What is an archive?

- An archive is made up of records created by an organisation or individual in the course of its daily activities but no longer needed by them for regular reference.
- The records may be in many different formats; handwritten, typed, printed, photographic or electronic.
- They are preserved permanently at Gloucestershire Archives because of their value as historical evidence.

What is an archivist?

An archivist is a professionally qualified individual who is responsible for acquiring, selecting, arranging, describing, preserving and providing access to records of enduring value, according to the principles of original source and order, and protective care of the materials to protect the materials' authenticity and context.

What is a conservator?

An archive conservator is a professionally qualified individual who looks after hundreds of thousands of irreplaceable papers, parchments, books, maps, photographs, and files, and makes them available for people to see and enjoy. They work to stabilise ('conserve' not restore) items, preserving original materials and historical integrity, to ensure that they will survive as they are, as a witness to future generations. Good collections care ensures that all our treasured documents are stored, accessed and handled in a way that prolongs their life

Who else works in the Archives?

- Other members of staff you might meet include Archive Assistants, Archive Support Officers, Customer Service Assistants.
- You are also likely to meet many other volunteers working with us or our partner organisations.

What does Gloucestershire Archives do?

- Gloucestershire Archives is a Gloucestershire County Council service. It also provides an archives service for South Gloucestershire Council.
- The geographic area that these councils cover used to be a single county, which we now call the historic county of Gloucestershire.
- Gloucestershire Archives exists to gather, keep and share historic archive collections relating to Gloucestershire and South Gloucestershire-and local and family history resources relating to Gloucestershire.
- The archive collections are stored in environmentally controlled strongrooms at the main Alvin Street site in Gloucester. These collections are available to view in the public research room.

What do we look after?

- Records of Gloucestershire County Council, and its predecessor authorities, form the bedrock of archive collections held.
- Gloucestershire Archives also collects and preserves key records from many other sources including: district and parish councils; courts and hospitals; Gloucestershire Constabulary; Gloucester diocese; non-conformist churches and other faiths; voluntary organisations, charities and businesses; prominent/land owning families; community groups and individuals.
- Together these form an unrivalled resource for the study of all aspects of life in the historic county of Gloucestershire, from the mid-12th century to the present day. Some collections, such as the papers of 18th century anti-slavery campaigner Granville Sharp, are of international importance.
- The core local studies collection is kept at the Alvin Street site and many local and family history resources (such as books, articles, newspapers, photographs and postcards) are distributed across Gloucestershire.
- Area-specific collections are kept at Local and Family History Centres based at libraries in Cheltenham, Cinderford, Cirencester, Stroud, Stow-on-the Wold and Tewkesbury. You can use them in the relevant venue.

- Gloucestershire Archives is working with partners such as Ancestry and “Know your Place” to digitise key family and local history resources. Many of these can now be searched and viewed online.

What is Gloucestershire Heritage Hub?

Gloucestershire Heritage Hub is based on the current site of Gloucestershire Archives. It will become the official home of Gloucestershire Family History Society, Gloucestershire Registration's copy certificates service and Gloucestershire Constabulary Heritage Group, together with Gloucestershire Archives. With support of the Heritage Lottery Fund and many other trusts, foundations and other donors, we are developing the Archives' public research room and adjacent accommodation to create new spaces for volunteers, community groups and organisations. We will work together to help extend the gathering, keeping and sharing of the documented and digital heritage of local communities in Gloucestershire and South Gloucestershire - and ensuring, in collaboration with partners, that this rich heritage continues to be accessible into the future.

What are the benefits of volunteering at Gloucestershire Archives?

- An opportunity to handle and research unique historic material relating to Gloucestershire and beyond
- Options to work on a number of projects and contribute to our understanding of the county's history and help to keep it for future generations
- Learning new skills and accessing training
- Regular contact with professional staff and an opportunity to meet other like-minded individuals
- A personal reference regarding the work done while volunteering at Gloucestershire Archives
- An invitation to an annual thank you event to acknowledge your contribution
- Invitations to various Heritage Hub events, courses and activities

SECTION 2 – Principles of Gloucestershire Archives Volunteering Policy

Purpose

The Service is committed to managing volunteers within guidelines as recommended by Volunteering England, and thus aims to provide a satisfying and supportive environment for its volunteers. Our current volunteering policy outlines the nature of the partnership relationship that we have with our volunteers. You can see it in full on our website www.heritagehub.org.uk

Values

The Service recognises that people become involved in volunteering for a variety of reasons and are often motivated by a range of personal goals. We celebrate the fact that our volunteer pool will reflect this diversity and are committed to providing opportunities that are personally fulfilling by matching individuals to appropriate volunteer roles.

Additionally, we are committed to playing a part in helping to address government initiatives associated with participation in volunteering; also to supporting individuals in their career development.

The roles that we offer comprise tasks that further the work of the Service, through involvement in project activity and/or by adding value to our day to day activities. We publish examples online at <http://www.gloscestershire.gov.uk/archives/working-with-us/volunteering/> and can supply printed format upon request.

Practice

Volunteers can expect to be:

- Involved in specific roles to enhance and support the work of the Service, but will not replace paid staff.
- Given a role description, which their nominated staff contact will discuss with them. They will have a defined place within the structure of the organisation.
- Consulted on matters that affect them
- Encouraged to develop their own skills and areas of interest within their volunteering role
- When appropriate, to work remotely on digital projects (e.g. transcribing original documents digitised on Ancestry), or re-Tweeting / liking social media posts.

Recruitment

The Service will aim to recruit volunteers from a wide range of backgrounds to reflect the diversity of the communities that it serves.

A variety of recruitment methods will be used.

We will pro-actively work with partners to seek funding for activities that provide volunteering opportunities for young people.

Expenses

The Service offers to reimburse volunteers' reasonable travel expenses to and from the place of volunteering, providing that these are supported by receipts or tickets.

Equality & Diversity

The Service is firmly committed to the principles of equality and diversity in the workforce and in the service we provide.

We welcome applications from all members of society, and will do everything reasonable and practical to make volunteering possible for all.

We will not tolerate discrimination of anyone on any grounds, including age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation, by any member of staff or by volunteers.

We will treat everyone equally with dignity and respect.

Induction & training

Each volunteer will receive a basic induction including Health & Safety advice, background information about the organisation and orientation around the building (including evacuation procedures).

Volunteers will also receive training specific to their role as appropriate.

Supervision & support

Volunteers will have a nominated contact who will supervise and support them in their role.

Health and Safety

We aim to ensure that volunteers will be provided with a safe working environment.

Gloucestershire County Council (GCC)'s Public Liability and Employer's Liability policies provide indemnity to any person volunteering to assist the Council in its business. This includes volunteers working at home and at other non-GCC sites.

Confidentiality

Where volunteers have access to sensitive information they are required to treat this as confidential.

SECTION 3 – Sample Volunteer Role Description

Role title:	Volunteer cataloguer
Responsible To:	Julie Courtenay, Collections Team leader
Where:	Gloucestershire Archives, Alvin Street, Gloucester, GL1 3DW
When:	A mutually convenient day and time to be arranged (Tuesday-Friday)
Commitment:	To be negotiated, but regular throughout the project. Suggest one session a week.
Duration:	January – March 2016
Purpose:	<p>To help prepare a detailed catalogue for the archive of Yearsley and Wadeson, a firm of solicitors once based in Mitcheldean (the archive includes property deeds and legal papers dating from the 16th century, records of local mining and brewing businesses from the 19th century and other records relating to local families, organisations and events in the Forest of Dean and beyond)</p> <p>This is a pilot project at Gloucestershire Archives supported by the Federation of Family History Societies. Lessons learnt from this project will help shape future FFHS projects elsewhere in the country</p>
Tasks:	<ul style="list-style-type: none"> • To examine and describe documents, entering key details onto an EXCEL template • To label documents with their unique reference number • To package and re-box documents as needed
Requirements:	<ul style="list-style-type: none"> • Willingness to take instruction • Willingness to work alongside other volunteers • Ability to enter data onto a simple EXCEL template • An eye for detail and a methodical approach to completing a task • Careful handling of original archive material • Being prepared to get a bit dirty (as some documents will have accrued dirt over time) • Some ability to decipher old handwriting may be useful, depending on the age of the documents you are working on • Ability to work without direct and constant supervision • Own lap-top would be helpful but not essential
What's in it for you:	<ul style="list-style-type: none"> • Enjoying an opportunity to handle and read original documents • Discovering more about the history of the Forest of Dean and beyond • Meeting other Archive volunteers • Learning new skills, brushing up existing ones • Being part of an interesting project that will help make the County's heritage available to researchers around the world
Notes:	Gloucestershire Archives will be responsible for welcoming the volunteer into the office; providing an induction and orientation around it; providing health and safety training and training for the specific task. Volunteers may claim reasonable travelling expenses.
For more information contact:	<p>Julie Courtenay Gloucestershire Archives, Clarence Row, Alvin Street, Gloucester, GL1 3DW julie.courtenay@gloucestershire.gov.uk</p>

SECTION 4 – Volunteering Agreement

This document is not a contract of employment. It is a statement of agreement between the Volunteer and Gloucestershire Archives.

Volunteering Role:

Name of volunteer:

Start Date:

Initial Hours Agreed/Frequency:

Email address:

In my role as volunteer, I will:

- Perform my specific duties to the best of my ability
- Behave in a positive and cheerful manner when dealing with members of the public in my volunteering role
- Be punctual and reliable in undertaking my role and contact my supervisor at my earliest convenience if I am unable to attend my volunteering placement at the agreed time for any reason
- Listen and follow my supervisor's instructions
- Let my supervisor know at the earliest opportunity if I wish to resign from my position and return any ID / Access cards as soon as possible
- Follow the policies and procedures for the organisation I am working in at all times
- Treat other people fairly and equally and not discriminate unlawfully against any person
- Abide by the confidentiality statement at all times (see below).

Gloucestershire Archives will:

- Provide a clear and accurate description of your role and duties
- Provide support and guidance to you via a designated supervisor
- Provide you with regular feedback on progress, discuss future development and resolve any issues
- Expect that staff at all levels will work positively with volunteers and where appropriate, actively seek to involve them in their work
- Provide appropriate training to enable you to undertake your volunteer role effectively.
- Offer to provide you with a reference upon leaving your volunteer role
- Aim to ensure that all volunteers and the people they interact with will be safe, supported and valued.

Confidentiality Statement

Volunteers may become privy to confidential or sensitive information. This may be information about a staff member, another volunteer, a customer, or another person. It may also be information that is confidential for organisational purposes or personal information about an individual's life and circumstances. The information may be received in conversation or in a written form such as on an application form.

I understand the need for confidentiality as described above, and agree to abide by the Confidentiality Statement, both when carrying out the role and at other times.

I have received, read, understood and agree to abide by this Volunteering Agreement.

Signed (Volunteer): _____ **Date:** _____

Signed (Manager): _____ **Date:** _____

Gloucestershire Archives is part of Gloucestershire County Council which has written policies on Health & Safety and on Safeguarding of children and vulnerable adults. These policies can be made available on request.

Note on collecting personal data:

Data Protection Act 2018 & GDPR: Gloucestershire Archives collects your personal information so that you can volunteer with us, including bank account details so that we can reimburse your travel expenses. The information will not be shared with anyone else. We will hold this data until you cease your volunteering activities with us. For more information have a look at our privacy notice which is available online at www.goucestershire.gov.uk/archives/policies

If you have a query or concern about how your data is handled or stored, please contact the County Archivist on 01452 425295

SECTION 5 – Training record

Record of training completed

SECTION 6 – Friends of Gloucestershire Archives

The Friends of Gloucestershire Archives (FoGA) was established in 1993 to provide help and support to the Gloucestershire Archives (then called Gloucestershire Record Office) and to educate people in the importance of preserving the county's archives.

FoGA organises events of different kinds for members during the year - seminars, talks, guided tours of historical buildings (often with tea), and an annual social evening with buffet.

Friends receive a Newsletter twice a year covering recent news, projects and activities.

There are also opportunities to join in various other activities, such as:

- Transcribing and indexing records
- Visiting local historical sites and other archives during the summer months
- Training at the Gloucestershire Archives
- Participating in Workshops and Mini-conferences
- Fundraising to buy equipment or documents
- Attending Social events
- Staffing exhibitions and open Days
- Looking behind the scenes at the Archives
- Campaigning on behalf of Gloucestershire Archives
- Attending talks, lectures and demonstrations in the winter

We are always looking for new ideas for events for the Friends and would welcome any suggestions you may have.

If you would like to join FoGA, please ask a member of staff for a membership form.

Website: <http://www.foga.org.uk/>

SECTION 7 – How-to guide

How to ask for help and advice

Each volunteer will have a supervisor who will be their named contact and whom they should contact should they require any assistance or advice. Your named contact is given below:

Name:

Email:

Telephone:

Volunteers at Gloucestershire Archives are coordinated by the Community Heritage Development Officer (CHDO). If you would like non-project-specific advice or if you have any difficulties during your time as a volunteer, you can contact the CHDO to discuss these.

CHDO: Sally Middleton

Email: Sally.middleton@gloucestershire.gov.uk

How to get the most out of your time at Gloucestershire Archives

- We will arrange a set day and time for you to volunteer with us. Please let us know in advance if you will not be able to attend a session
- If you regularly visit on the same day each week, but find yourself unable to attend, please let your named contact know so that they are not concerned about you
- Always follow the instructions you are given. If you are unsure or have any suggestions, please ask us
- Don't be surprised if you are asked to change or correct your work - this is a normal part of the editing process
- If you have any problems or concerns, please let us know of them as soon as possible either via your named contact or through our CHDO - the sooner we know, the sooner we can help!
- Try to get to know the other volunteers on your project. You might be able to help each-other
- Make sure you send us your work at regular intervals as agreed with your named contact
- Remember that your named contact might be working on a number of projects so other volunteers might have different instructions - always ask if you are unsure
- Remember to adhere to research room guidelines
- Remember to send your timecard and expenses sheet as agreed with your named contact - let us know as soon as possible if there are any difficulties
- If you are working on original documents, it might be tempting to arrange them in a different order. Please don't do this! The order the records are found in can tell us a lot about them in addition to the information they actually contain
- Always use personal protective equipment if you are asked to do so - it is for your safety

Gloucestershire Archives document handling guidance -

The Top Ten Key Points to Remember!!

- **Great care must be taken at all times when handling archives.** These records are the original and often the only version; they may be very old, and damaged or fragile.
- **Remember to look after your own health!** Some boxes and volumes are heavy and awkward, so don't be shy about asking someone to help you if needed. Also if an item is very dusty or has been mouldy, ask for a mask rated FFP2 or FFP3 in order to protect your lungs (available from Collections Care or at Document Control in the Searchroom).
- **No food or drink** should be in the document handling area. This includes chewing gum and sweets
- **Hands should be clean and dry** before touching archives. You may need to wash your hands frequently, or you may wish to wear vinyl or nitrile gloves and replace them when they become soiled. The Archives will supply these.
- **Use pencils only** when working near original documents – never pens or markers.
- **Items should be well supported** on a clean, clear table top away from the edge.
- **Use two hands** to move and support items, even single sheets of paper, as they can easily dent or tear.
- **Keep items in the order you find them.** If extracting something from a bundle of documents, remove and turn over items on top carefully until you get to the one you are looking for.
- **Always handle photos by the edges and never touch the emulsion surface.** Wear vinyl gloves (available from Collections Care or at Document Control in the Searchroom).
- **When using books, remember that many old books were not designed to be opened flat, and open them only as far as they will naturally open.** Support the book using book supports such as foam wedges or cushions. You may need to use 'snake weights' to gently hold the pages open.
- **If you have any concerns about the condition of a document or item,** please let a member of staff know

SECTION 8- Blank Forms

Volunteer Expenses Claim Form (Public Transport)

Please complete Sections 1 – 3 and attach all related tickets/receipts (these should show VAT) – then give everything to your main contact at the Archives. This must be within three months of the first journey you are claiming for.

Section 1: Contact details

Name			
Address			
		Postcode	

Section 2: Trip details (you can claim for up to four trips)

Reason for trip					
Date of trip (DD/MM/YY)	Journey details (Single/return from x to y)	Type(s) of transport	Cost of travel (£)	Related expense(s)	
				Type eg parking	Value (£)

Reason for trip					
Date of trip (DD/MM/YY)	Journey details (Single/return from x to y)	Type(s) of transport	Cost of travel (£)	Related expense(s)	
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				Type eg parking	Value (£)

Reason for trip						
Date of trip (DD/MM/YY)	Journey details (Single/return from x to y)	Type(s) of transport	Cost of travel (£)	Related expense(s)		
				Type eg parking	Value (£)	

Section 3: Summary of all trips detailed on this form

Description	Amount
Total cost of all travel (£)	
Total value of all related expense(s) (£)	
Total amount of this claim	

I confirm the amount(s) claimed has/have been incurred in connection with volunteering for Gloucestershire Archives. I have attached all related VAT receipts.	
Signature	
Today's date (DD/MM/YY)	



Gloucestershire County Council will use this information for administration and reporting purposes.
If you have a query or concern regarding this please contact the County Archivist on 01452 425295.

For Archives office use only

I confirm these expenses relate to authorised volunteering activities. I have checked receipts and arithmetic.			
Name		Signature	
Position		Date (DD/MM/YY)	

Authorisation (by an Archives manager):

Name		Signature	
Position		Date (DD/MM/YY)	

For Business Services Centre use only

Ledger Code:			Document No:			
Year Marker	Cost Centre	Detail	Amount (£)	VAT	CIT	Certified by
	206962	33000				

Volunteer Expenses Claim Form (Car)

Please complete Sections 1 – 3 and attach all related VAT receipts – then give everything to your main contact at the Archives. This must be within three months of the first journey you are claiming for.

Section 1: Contact details

Name			
Address			
		Postcode	

Section 2: Trip details (you can claim for up to four car trips with this form)

Reason for trip			
Date of trip (DD/MM/YY)	Total distance driven (miles)	Related expense(s) eg parking, toll	Value of related expense(s) (£)

Reason for trip			
Date of trip (DD/MM/YY)	Total distance driven (miles)	Related expense(s) eg parking, toll	Value of related expense(s) (£)

Reason for trip			
Date of trip (DD/MM/YY)	Total distance driven (miles)	Related expense(s) eg parking, toll	Value of related expense(s) (£)

Reason for trip			
Date of trip (DD/MM/YY)	Total distance driven (miles)	Related expense(s) eg parking, toll	Value of related expense(s) (£)

Section 3: Summary of all trips detailed on this form

A. Total distance driven (miles)	B. Total value of all related expense(s) (£)

I confirm the amount(s) claimed has/have been incurred in connection with volunteering for Gloucestershire Archives. I have attached all related VAT receipts.	
Signature	
Today's date (DD/MM/YY)	



Gloucestershire County Council will use this information for administration and reporting purposes. If you have a query or concern regarding this please contact the County Archivist on 01452 425295.

For Archives office use only

Total distance driven (miles) (A)	Non-standard rate per mile (£)	Amount payable (£)
Total value of all related expense(s) (B)		
Total amount of this claim		
I confirm these expenses relate to authorised volunteering activities. I have checked receipts and arithmetic.		
Name		Signature
Position		Date (DD/MM/YY)

Authorisation (by an Archives manager):

Name		Signature	
Position		Date (DD/MM/YY)	

For Business Services Centre use only

Ledger Code:			Document No:			
Year Marker	Cost Centre	Detail	Amount (£)	VAT	CIT	Certified by
	206962	33000				

Volunteer Time Sheet

Thank you for volunteering to support the work of Gloucestershire Archives @ Gloucestershire Heritage Hub. Please help us to keep an accurate record of volunteer assistance by using the table below to record any time worked (*see over for further information*).

NAME: _____

How to Complete this Form

Date: Use this column to record the date on which work was undertaken

Details of Work Undertaken: Please use the 'Details of Work Undertaken' column to give a brief summary of work undertaken on each recorded session.

Types of Volunteer service:

1. Unskilled (general support, driving, furniture shifting, stewarding etc)
2. Skilled (research and cataloguing, presentations, interviewing, IT etc) by volunteers with experience and/or some formal training but no professional skills.
3. Professional (a qualified volunteer who uses his professional skills in support of the project).

Time Worked: Use this column to record the total amount of time spent per session on any particular task.

Running Total: Use this column to record a running total of all hours worked.

SECTION 9 – Style Guide for listing

Much of the work done by our volunteers at Gloucestershire Archives involves enriching our catalogues with additional detail. For this to be successfully incorporated into our catalogues, we need you to follow certain conventions and rules. These form part of our ‘house style’ and help us to keep our catalogues consistent and user-friendly.

In short:

- Avoid abbreviations wherever possible
 - we may understand them but others reading your description in future may not
 - they can make a sentence harder to read because it doesn’t flow naturally
- Always use sentence case - Capital letters for names, places and at the start of a sentence
 - please don’t put surnames in all caps
- Use [square brackets] for any information you supply that is not in the original document
 - this is so that it’s clear to future researchers what information has been supplied by the person doing the listing
- When numbering documents, use numbers /1, /2, /3, rather than letters /a, /b, /c
 - this is because there are only 26 letters, and you may have more than 26 documents

As a general rule, no abbreviations should be used in our catalogue; full sentences should be used, and ampersands (&) should never be used unless directly quoting from a document. When quoting from a document, please put the quotation inside double “quotation marks”.

Bear in mind that the people who will be reading your work will probably not be familiar with the documents or the collection, so always be as clear as possible and assume no prior knowledge of the records.

Remember that different projects may have slightly different requirements so if you are unsure how to use these conventions on the project you are working on, always ask.

For a listing project you will usually be given a template to complete. If you aren’t sure how to complete this or are encountering problems with it, please ask. Make sure you fill in all the columns that apply and check your work before sending it to your staff contact.

In detail:

This section is for reference as you go along, to help you remember how we’ve asked you to present the information you are recording. Don’t worry if it looks a little daunting at first – just keep it by you as you work so that you can refer to it easily whenever you need it.

Punctuation

- “Churchwardens’ accounts”, “Overseers’ records” etc: remember the apostrophe after the “s”
- Initials in personal names: no abbreviation points, but with a space between each letter
 - for example, E W M O de la Hey
- Please don’t put full stops at the ends of titles and descriptions

- Text following a colon or semi-colon begins with a lower case letter, never a capital, unless it is a proper noun or a quotation from a document
- Put titles of publications in single quotes
- Put quotations from documents or any other quotes in double quotes
- In order to avoid confusion between 'saint' and 'street', expand any abbreviations of 'street' but leave 'saint' as 'St'
- Expand 'no' and 'nos' to 'number' and 'numbers' wherever possible
- Expand " to 'inches' and ' to 'feet' when dealing with maps and plans
 - but keep 'cm' for 'centimetres' if you come across it: future users are more likely to understand what 'cm' stands for than "
- Please don't put spaces around dashes in dates: '1944-1945', **not** '1944 - 1945'

Brackets

- Use square brackets [] for any information **not in the document** which you are supplying
 - for example, notes about the document or people mentioned in it, approximate dates, cross-references and so on
- Use round brackets () for original dates of copy documents and make it clear that it is a copy made later (include the date the copy was made if you can)
 - for example, a 1970s photocopy of a map originally drawn in 1764 is dated (1764) in the date field, and in the title or description (whichever is more appropriate), put "Photocopy of map, (1764), made 1970s"
 - bear in mind that if you are listing in Excel, it interprets round brackets as indicating a minus – if a date in round brackets is the only thing you are putting in a cell, put a single quote mark immediately before it to tell Excel to ignore it: '(1794)'
- Also use round brackets for notes of events written after their occurrence, and make it clear that the dates refer to the events, not the document:
 - eg lists of vicars and other officials, made later: "List of vicars, (1239-1943), compiled in 1943" in the title or description, and 1943 in the date field (as this is the date of the actual document)
 - Also use round brackets for information **supplied in the document**, for example, the names of the architects who produced a plan
 - Also use round brackets for the names of counties other than Gloucestershire, even where this is not recorded in the document, unless you are using a significant amount of deduction to decide on the county that the document relates to. Please give the names of counties in full, not as abbreviations
 - for example, 'Netheravon (Wiltshire)' or 'Pershore, Malvern and Bredon (all Worcestershire)'
 - we don't need you to indicate Gloucestershire as it can be taken as read that most of our material relates to this county!

Syntax and Wording

- **No ampersands (&);** enter the word 'and' fully, unless referring to an organisation (e.g. Fulljames & Waller) or quoting directly from the document
- Use 'concerning', 'regarding' or 'relating to' instead of 're' and 'as to'

- Use 'of' rather than a comma to indicate a place of residence
 - e.g. 'Thomas Shadwell of Westminster' rather than 'Thomas Shadwell, Westminster'
 - always put the occupation or line of business of a person or organisation **after** their place of residence/business, for example 'Thomas Shadwell of Westminster, clerk' rather than 'Thomas Shadwell, clerk of Westminster', 'Fulljames and Waller of Gloucester, architects' rather than 'Fulljames and Waller, architects of Gloucester'
- In the 'Number of Documents' field, please only use the following terms:
 - volume/volumes (not 'book' or 'books')
 - bundle/bundles (not 'packet' or 'packets', 'envelope' or 'envelopes' etc)
 - document/documents
 - file/files (not 'folder' or 'folders')
 - box/boxes
 - roll/rolls
- Please include the relevant term as well as the number in the 'Number of Documents' field – don't just put '1' or '5' and assume future researchers will understand what you're referring to

Abbreviations and Contractions

As a general rule, don't abbreviate!

- Expand abbreviated personal names to their full forms unless quoting from a document
- Enter months in full
- Enter names of counties in full
- Expand 'pp' to pages
- Expand 'f' and 'ff' to 'folio' and 'folios'
 - Expand 'd' to 'died' and put the date immediately after it

Dates

- Enter **years only** in 'Date' field
 - for example, '1738', not '3 May 1738', '1845-1913', not 'December 1845-May 1913'
- Enter years fully
 - for example, '1738-1798', not '1738-98'
- When entering dates in other fields **do not** use ordinal number abbreviations
 - for example, '3 May 1738', not '3rd May 1738'
- For estimated dates do not use question marks, use square brackets, '[]', or 'c.'
 - 'c.' dates should not have brackets unless the document is a copy of a document with a 'c.' date: e.g. a copy of a document originally written c.1600 would be expressed (c.1600)
 - There should be no space between the 'c.' and the date
 - 'c.' for 'circa' should still have an abbreviation point
- Write 'century' in full (**not** abbreviated to 'cent.')
- Use 'undated' for documents without dates (**not** 'nd') and try to provide an approximate date, even if it is just a century, e.g. 'undated, [20th century]'; 'undated, [early-mid 19th century]'

Old/New Style dating:

- Before September 1752, the year began on 25 March and ended on 24 March. This means that documents dated between 1 January and 24 March, earlier than 1752, use a different year to the one we would use
 - for example, if a document says it's dated 3 March 1688, we would understand it as being 3 March 1689
- Pre-1752 documents dated between January 1 and March 24 need both years to be recorded: the old style (earlier) and new style (later). Our cataloguing software uses new style dating in its date field, so in the date field, enter the later of the two years (e.g. for 1309/10 enter 1310) but make a note in the title or description field that the document is dated 1309/10

Form for entering old style dates:

1599/1600

1305/6

1412/13

1724/5

1649/50

- Enter dates exactly as given above, with no extra numbers
- If dates separated with a slash appear after 1752, it is likely that they are referring to documents spanning more than one year (e.g. annual bundles of accounts, 1893/4-1898/9). Enter the earliest and latest years in the date field and the 'full' years in the title or description field

Monarchs

- Put George III (using capital i not the number 1), Henry IV, etc
- Even if you think it's obvious which monarch you're referring to, please still use their number, because it may not be so obvious to future users
 - for example, put Elizabeth I, not just Elizabeth, even though it might be obvious to you that the document couldn't possibly date from the reign of Elizabeth II; or James I, not just James, even though you happen to know that a document dated 1610 can't be from the reign of James II
 - we have to play the long game in archives, and who knows how many more monarchs named Elizabeth there might be!

Public Research Room Guidelines

Many of the documents you will use here can't be replaced so here are some guidelines we ask you to follow so that they are preserved for future generations.

General guidelines, please:

- Only use soft-leaded pencils – these are available for sale at Reception.
- Leave your bags and coats in one of the lockers provided.
- Do not bring food and drink into the research room. You can use the Coffee Lounge for refreshments.
- Work quietly. Keep any mobile devices on silent and leave the research room if you wish to make or receive calls or hold lengthy conversations with other visitors.
- Make use of our free published Help guides and talk to a volunteer buddy or member of staff if you need extra help.

When using original documents, please:

- Make sure that your hands are clean and dry – ask us for gloves if you are using photographs.
- Ask us for protective equipment (mask and gloves) if you suffer from any dust allergies or respiratory conditions.
- Use supports and weights for volumes and maps – ask our staff if you are not sure where these are or how to use them.
- Rest your notepaper on the table not the document.
- Use a clear ruler to follow a line instead of your finger or a pencil – these are available in the research room.
- If you are using documents that are in a bundle, keep them in their original order.
- Ask our staff before you make any copies of documents or publications.

When using copies of documents available as microfilms or microfiche, please:

- Take only one microfilm or microfiche at a time. When you remove a film or fiche from the drawer put one of the marker cards in its place. This will help you put it back in the correct position – ask our staff if you are not sure.
- Close the drawer of the cabinet when you have finished using it.
- Ask one of our staff if you have difficulty using any of the machines to view your film or fiche. Wind your microfilm back on to the original reel – ask our staff if you need help.
- Use your camera to make a copy of information that you are viewing; only use the reader printer if you want to print a copy straightaway.
- Switch off your machine when you have finished using it.