

Archives Reference Services Policy

Type of Policy: Archives

SUBJECT: Archives Reference Services Policy				
NEW	APPROVED	EFFECTIVE DATE	REVISED	POLICY NUMBER
June 2020	Sept. 16, 2020	Immediate	Feb. 24, 2024	06

Policy

The Archives will provide access to processed materials in its collection, as well as to its ready reference collection, and publications collection. Archival materials will be retrieved from storage and returned to storage only by Archives staff, who will always be present while researchers handle archival materials. Unprocessed materials will not be available to researchers.

Definitions

Processed material: Archival materials prepared for use for researchers. Materials will have had preservation work completed on them, been arranged into series and files, and had a reference code applied. Materials will also have been catalogued and there will be a finding aid available.

Procedure

The Archives makes finding aids of collections which are available to public researchers on Archeion at <https://www.archeion.ca/sisters-of-st-joseph-london>. The Archives also holds other records which are available only to congregational members.

Priority for all reference inquiries will be given to congregational members. Researchers who are not members of the congregation must book an appointment and complete a *Research Agreement* and *Request for Reproduction* before their visit, explaining the purpose of their research.

Congregational members are also encouraged to book an appointment to view records, to permit Archives staff sufficient time to retrieve the records.

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No reference inquiries will be undertaken by telephone. All callers will be informed that they must fill out the *Research Agreement* and *Request for Reproduction* forms, and that these forms will be either mailed or emailed to them. No inquiries concerning living Sisters or withdrawn Sisters will be permitted. A reference inquiry will be closed if three months have elapsed, and the forms and reference fee have not been received by the archives.

The Archives reserves the right to restrict access to the collection depending on the condition of the archival material, the amount of material requested, and the purpose of the research. The use of certain materials may also be restricted for reasons of privacy or sensitivity, or under a donor agreement. Access restrictions will be applied equally to all researchers and reviewed periodically. No researcher will be given access to any materials that contains a personal information bank such as donor agreements or personnel records, or to other proprietary information such as appraisals, insurance valuations, or condition reports.

General and specific access restriction are stated in the *Privacy and Access Policy*.

Students who attended a private school administered by the Sisters may obtain their transcripts from the Human Resources Branch, Ministry of Education, Mowat Block, 19th Floor, 900 Bay Street, Toronto, Ontario, M7A 1L2 or by calling 416-327-9045.

For non-congregational members, there is a fee for each reference inquiry. This fee will be credited to the Archives budget to cover the costs associated with records retrieval from off-site storage, copying, and staff time. The Archives will undertake research on behalf of a researcher who is unable to visit the Archives.

The Archives may refuse to copy archival materials if the materials are oversize, fragile, or fall outside the fair use provisions of copyright law as stated in the *Request for Reproduction* agreement. Only Archives staff may make copies of materials using either a photocopier or scanner. No more than 10 pages will be copied by staff, and no digital copies will be provided to researchers. Researchers are permitted to use cameras but not flash photography to make their own copies under the terms of the *Request for Reproduction* agreement, for private use and study, not publication or display. In this case, the items must be placed flat on a table and removed and returned to folders one at a time. Researchers are not to press down on the documents or bindings or to fold items.

Permission to study archival records does not extend to publication or display rights, under the *Request for Reproduction* agreement. The researcher must request this permission in writing from the Archives.

Material may not be removed from the archives, and no material will be loaned, except in the cases of a loan to another heritage institution for purposes of exhibition.

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Researchers will be requested to follow the following rules for visits to the Archives:

- Only pencils, not pens, may be used. No marking or erasure of materials is allowed.
- Post-it or other sticky type notes may not be used, and pages must not be folded or dog-eared.
- Items must be kept in their existing order within folders. Folders must be kept in their existing order within a box. The researcher should handle only one archival record at a time, and only one file at a time, not removing items from folders.
- The researcher must not write on anything that has items below it, such as a folder containing papers, or trace anything.
- Cotton or nitrile gloves must be worn when handling photographs or artifacts.
- Food and drink including chewing gum and candy are prohibited in the archives.
- Researchers must leave personal belongings such as coats, briefcases, backpacks, folders, and oversize purses in a closet outside the Archives.
- Researchers should wash and dry hands before handling archival materials and avoid applying hand lotion before working with archival materials.

Researchers will be held responsible for any damage to archival materials. Researchers who do not exercise care in handling archival materials will not be permitted to return to the Archives.

Researchers may encounter records that contain private or restricted information about individuals or organizations and this information may not be transmitted by the researcher to others by any means.

No researcher will be refused access to the Archives unless it is determined that the materials will be physically damaged or used for libelous or illegal purposes.

Review

This policy will be reviewed every three years.

Benchmarks:

This policy is effective if access to the Archives is equitably provided to all researchers subject to access restrictions under the *Privacy and Access Policy*, without risk to the congregation through breaches of privacy or disrespect for copyright law.

Responsibility

This policy is owned and supported by the Congregational Leadership Circle. The Congregational Archivist is responsible for the management and support of this policy. Archives staff are responsible for ensuring researchers respect the conditions stated in this policy.

Documentation

Research Agreement

Request for Reproduction

Privacy and Access Policy

Copyright Act (Canada)

References

Pearce-Moses, R. (2005). *A Glossary of Archival and Records Terminology*. Chicago: Society of American Archivists.