

GUIDE TO MANAGING HISTORICAL SOCIETIES

Involving People

Research enquiries

Research is an important function of historical societies. Whether researchers visit the organisation to seek information or contact the organisation with an enquiry, procedures need to be in place to ensure that the enquiry is handled efficiently.

In the past enquiries were commonly made by correspondence or via the telephone. With most organisations having some access to the Internet, either directly to the organisation or via a member's home computer, email enquiries tend to be the norm.

Recording enquiries

However the enquiries arrive they must be recorded. Records about enquiries can be kept in a book, on enquiry sheets or on computer.

Keeping a record of research enquiries provides information about the enquirer including contact details, the number of enquiries received in a given period, details of the actual enquiry, how the enquiry was handled – name of person dealing with the enquiry, resources used and summary of response – date when enquiry completed.

Such information can be useful for:

- preparing monthly or annual reports
- as a resource for checking for useful material when handling similar enquiries
- being able to contact a researcher if additional information on the topic is found
- being able to link researchers with similar interests provided all parties agree
- ensuring that the enquiry has been completed
- providing a snapshot of how the collection is used

Research forms

Researchers may be asked to complete a research enquiry when they visit an organisation. Research forms can be provided online for researchers to complete as an online form to submit to the organisation or to download and complete before sending to the organisation. Some organisations ask researchers who ring them to place the details of the enquiry in an email sent to organisation.

Having the details clearly written down assists the person looking for the information.

Details required include:

- name and contact details of the person making the request
- full details of information required
- a summary of information already known, especially if it a family history related request
- space for date request received
- name of person handling the request
- space for resources used and any other details
- date request completed

A copy of the information forwarded to the enquirer can be kept with the form.

Conditions of use of the collection and any charges should also be provided.

Sample research forms

Royal Historical Society of Victoria – Application for the use of Manuscripts Collection
<http://www.historyvictoria.org.au/pdf/manuscripts.pdf>

Deniliquin Genealogy Society
<http://members.bordernet.com.au/~denifhg/research%20form.html>

Surf Life Saving Australia
http://www.slsa.com.au/site/_content/resource/00001096-docsource.pdf

Devon Record Office
<http://www.devon.gov.uk/researchrequestform.pdf>

Culture & Heritage Museums (York County South Carolina) provides detailed information as to how researchers can make requests to the organisation
<http://chmuseums.org/mccelvey/research-procedures.php>

Online research forms

Ipswich Public Library
<http://library.ipswich.qld.gov.au/lh/enquiry.htm>

Boonton Holmes Public Library (USA)
<http://www.boontonholmeslibrary.org/Local%20History%20Request.htm>

Researchers visiting the organisation

Researchers may be required to sign the Sign In book when attending the organisation.

Ensure that any special conditions on using the research area are clearly outlined.

- Bags left in lockers
- Grey lead pencils used for notes
- One or two items available for use at a time
- Places for items no longer required to be left
- Restrictions on copying of material
- Charges for copying material

Increasingly researchers are bringing laptop computers into research facilities.

Desks close to power points may need to be provided – ensure that visitors and staff are not going to trip over power cords.

Some organisations stipulate that researchers should contact the organisation in advance before visiting so that material will be ready for researchers to use when they arrive.