



Guide No. 1 The job of the Custodian of Records

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This handout gives an overview of the job of Custodian of Records. Other handouts deal in more detail about the particular aspects of the job and its responsibilities.

1. What are records and why do they need to be kept?

Quaker meetings, like all organisations and communities, generate and receive records. The National Archives defines a record as 'recorded information regardless of media or format, created and received in the course of individual or organisational activity which provides reliable evidence of policy, actions and decisions'.

Records are kept to fulfil administrative, business, financial, accounting and legal obligations. They provide evidence of decisions, activities, relationships, rights and obligations, and inform current and future work. Some records are of historical value and should be retained permanently as archives. For information on archival records and on how long records need to be kept, see *Guide No.2 Meetings' records and their retention and disposal*.

The Religious Society of Friends 'has throughout its history sought to be meticulous in the keeping of records (whatever shortcomings there may have been in practice) and recognises that it stands as trustee in relation to those records' (Edward H. Milligan and Malcolm J. Thomas, *My ancestors were Quakers*, London, 1999). Good-record keeping is, in many cases, a legal obligation (see *Guide No. 3 Legislation affecting records and record-keeping*). It is also part of the testimony to Truth and of *Quaker Faith and Practice* (see *Quaker Faith and Practice*, 4th edition, 2009, §4.39-4.45).

2. What is records management and why is it important?

Records Management utilises an administrative system to direct and control the creation, version control, distribution, filing, retention, storage and disposal of records, in a way that is administratively and legally sound, whilst at the same time serving the operational needs of an organisation and preserving an adequate historical record.

Records Management is concerned with the 'lifecycle' of records and aims to manage records throughout each stage. There are 3 stages in the life cycle of a record:

1. **Current** when they are used regularly and frequently in day-to-day work.
2. **Semi-current** when they are not used as frequently as current records, but need to be retained for legal, operational, administrative or business reasons.
3. **Archives** if records are selected for permanent retention, forming part of the record or history of a meeting.

Good records management practice:

- a. Helps meetings create and keep authentic and reliable records to demonstrate evidence, accountability and information about decisions and activities.
- b. Maintains securely, and preserves access to records as long as they are required to support operations and for audit purposes.
- c. Identifies and protects records that are vital to the running of a meeting.
- d. Identifies and preserves securely those records deemed archives, protecting the historical memory of a meeting.
- e. Destroys other records once they are no longer required, ensuring the efficient use of accommodation.
- f. Meets legislative and regulatory requirements.
- g. Helps meetings to deliver services to Friends and non-Friends in a consistent manner, ensuring records can be quickly and easily retrieved.
- h. Protects the interests of a meeting and the Religious Society of Friends.

3. The job of the Custodian of Records

Area Meetings should appoint a Friend to act as a Custodian of Records or else appoint a committee for the purpose. Area Meetings should take responsibility for the records of their constituent Local Meetings, ensuring their timely transfer to the Custodian of Records (*Quaker Faith and Practice*, 4th edition, 2009, §4.39).

Whether an Area Meeting appoints a Custodian of Records or a committee, it is best practice that they should have a job description or terms of reference making clear their duties and authority. Friends House Library can provide meetings with advice and guidance on what to include. An example job description can be found in *Right Ordering: a handbook for business practice within the monthly meeting* (Hemel Hempstead, 2003) by Luton & Leighton Monthly Meeting (now Luton & Leighton Area Meeting), which is available at <http://www.quaker.org.uk/clerks> (listed under Resources for clerks).

Custodians of Records do not work in isolation. They work with the Clerk of the meeting and with other Friends. The creation of records is under the direction of the meeting, mainly the responsibility of the Clerk; whilst the care, use and disposition of records are mainly the responsibility of the Custodian of Records.

The Custodian of Records should be responsible for co-ordinating proper management of records of the Area Meeting, Local Meetings and committees by:

- a. advising on the creation, indexing, retention and safe-keeping of records, and their archiving and disposal when they are no longer current.
- b. drawing up and documenting policies and procedures for managing records and ensuring they are followed.
- c. providing advice to the Clerk on the preservation of records and advising on materials to use to ensure their long-term survival.
- d. maintaining a full catalogue of records and archives and where they are located, whether kept in the meeting house safe or strongrooms elsewhere. It is advised that the Custodian of Records checks contents at least triennially.
- e. depositing, where necessary, archives with an appropriate national, county or municipal record office. Quaker archives should be placed on deposit there, so that they remain the property of the meeting while benefiting from the care of professional archivists. (see *Guide No. 9 Depositing archives with appropriate repositories* for an example of a minute recording deposit)
- f. securely disposing of records that are no longer required.
- g. deciding, in conjunction with the Clerk, whether records should be made available to researchers. Many meetings make available records more than 50-years old, subject to exemptions where particular discretion is needed (for example, overseers' minutes, any hardship fund records and/or other sensitive documents).
- h. making an annual report to the Area Quaker Meeting.
- i. informing Friends House Library of their appointment as Custodian of Records and the records held by the meeting and elsewhere.

If the job of Custodian of Records is the responsibility of one person, then that person should liaise with Local Meetings and committee clerks who are responsible for the records of their meeting or committee. Alternatively, a committee could be set up comprising the Area Meeting Custodian of Records, the Clerk and representatives from the constituent Local Meetings.

If an Area Meeting does not appoint a Custodian of Records, responsibility for records rests with the Clerk.

4. Have I got what it takes to be a Custodian of Records?

Custodians of Records do not need a qualification in archives and records management, but it is useful to have an interest in the subject and an understanding or interest in Quaker history. The ability to work and liaise with others is important, as well as a pro-active and enthusiastic approach to the work. It is also useful to be methodical, accurate and systematic.

5. Further advice

For further advice on managing records and archives you can either write to Friends House Library, Euston Road, London NW1 2BJ, telephone 020 7663 1135 or send an email to library@quaker.org.uk

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All guides can be downloaded from the Britain Yearly Meeting website www.quaker.org.uk/Library on the Support for Meetings page or requested from the Library.

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