

## **We've got a policy for that!**

Presented by Lynn Bradley and Heather Arnold at the South Eastern Historical Association Seminar, 'Stuff you need to know 2', on July 29, 2018

We were thinking about just having a session on volunteers and whether your group needs policies and procedures relating to your volunteers and then we thought about what other policies a group could have and came up with this list.

We have included some links to policies to give you some idea of what your policies could look like. For more information the RHSV website – History Victoria Support Group has a great section 'Guide to Managing Historical Societies'

<http://www.historyvictoria.org.au/socguide/gindex.htm> on the left hand side, click on both 'articles' and 'procedures' for lots of policies, guides and helpful advice.

The Federation of Australian Historical Societies <https://www.history.org.au/> also has some useful information under the 'Support' heading.

Another good source of information on policies for not for profit groups such as Heritage Groups is the Institute of Community Directors – go to the Policy Bank section <https://www.communitydirectors.com.au/icda/policybank/>

Here some information on areas that Historical Societies may need policies and procedures on.

- **Volunteers policy**

- Why do we need one? Volunteers make up the bulk of the custodians of local history in Australia. The Federation of Australian Historical Societies conducted a survey in 2016 and there were at least 300 responses so that gives an idea of the amount of Historical Societies in Australia, plus numerous family history Societies. Very few of these groups them would have paid workers and even places with paid staff, such as the PROV, also have a lot of volunteers.
- A survey in 2017 by Volunteers Australia <https://www.volunteeringaustralia.org/> said that there were 12.3 million volunteer hours in Australia (all up not just Local History) which is worth \$477 million to the economy. So, because we all rely on volunteers to run our Societies, Museums and Halls etc having a policy which covers their activities is a good idea.
- What should the policy cover? Here are a few suggestions
  - what is the role i.e job description
  - what skills are required
  - what training is required
  - what hours will they work
  - induction process
  - health and safety regulations

- what are their rights and responsibilities
- who do they report to
- is a police check required.
- Here are some Policies relating to volunteers
  - Victorian Government Volunteer.vic  
<https://www.volunteer.vic.gov.au/>
  - RHSV History Victoria Support Group  
<http://www.historyvictoria.org.au/socguide/procedures.htm>
  - Museums and Galleries of NSW  
<https://mgnsw.org.au/sector/resources/online-resources/volunteers/develop-volunteer-policy/>
  - Volunteering Victoria <http://volunteeringvictoria.org.au/volunteer-management-toolkit/>

- **Social Media Policy**

- Why do we need one? Social Media sites such as Facebook, Instagram are a great way of communicating with the community about your Society, events, displaying your photos and also receiving information about items in your collection. However, you want your organisation to be represented professionally and if you are dependent on local or state government funding then you want to make sure that all the tweets, Facebook posts, Instagram posts are respectful to the community and the funding bodies. This isn't just your Institution's social media account but those of your members. Do you want your President involved in a war of words on-line with local Councillors or Council Officers over, for instance, a planning issue? People have a right to free speech but sometimes Facebook or Twitter isn't the right medium for that, especially if it seems that they are speaking on behalf of an organization.
- What should the policy cover? Here are a few suggestions
  - who is authorized to represent the Society on social media
  - what can a member say about the Society or issues the Society is involved with on their own social media
  - Copyright issues e.g. who 'owns' the images being posted
  - the extent to which members can use the Societies own computers to download material or post on social media.
- Here are some policies relating to Social Media
  - Nepean Historical Society  
<https://nepeanhistoricalsociety.asn.au/about-us/our-purpose/>
  - Port Macquarie Historical Society <http://www.port-macquarie-historical-museum.org.au/policies.php>
  - The website Hootsuite <https://hootsuite.com/#> has some great resources regarding Social Media – click on the Education tab and then under Resources check out the Blog and Guides.

- **Privacy Policy**

- Why do you need one? Gone are the days with historical societies that you can distribute everyone's address and phone number to all and sundry because, after all, it's a small town and everyone knows where everyone else lives anyway and what they get up to. The use of social media, email and websites etc also brings up other aspects of privacy - do you seek permission to publish member's photos on your social media or in the newsletter? Do you have your meeting minutes on-line with a full list of attendees including surnames? Do you always use the bcc option when you send emails to groups of people? These days most people expect privacy if they are a member of a group and expect that if they provide information to a Society, for instance in purchasing items or registering to attend functions, that their information will be kept private.
- What should the policy cover? Here are a few suggestions
  - why does your Society collect personal information
  - what sort of information does it collect
  - who can access the information
  - provision of information to third parties
  - use of cookies
  - use of personal information and photos of members on social media and in newsletters – do you need a 'photo publicity consent form'?
  - protocol for sending emails to more than one recipient (i.e use the bcc option)
- Here are some policies relating to Privacy
  - National Museums Australia  
[http://www.nma.gov.au/about\\_us/ips/policies/privacy\\_policy](http://www.nma.gov.au/about_us/ips/policies/privacy_policy)
  - East Melbourne Historical Society <https://emhs.org.au/privacy>
  - Royal Western Australia Historical Society  
<https://www.histwest.org.au/privacy>
  - Footscray Historical Society  
<http://footscrayhistoricalsociety.org.au/our-mission/mission-of-footscray-historical-society/privacy-policy/>

- **Disaster Policy**

- Why do you need one? It's too late when disaster strikes to discover that you have no idea what to do and that well meaning people have 'taken home' items to dry them out, store them or whatever and by the next day you have no idea where half your collection is. Also, a

disaster policy which covers ongoing maintenance can prevent a major disaster

- First published in 2000 by the Heritage Collection Council, *Be Prepared: guidelines for small museums for writing a Disaster Preparedness plan is still relevant and useful*. You can access it here <http://seha.org.au/be-prepared-guidelines-for-small-museums-for-writing-a-disaster-preparedness-plan>
- Minnesota Historical Society also has a good overview of writing a disaster plan  
[http://www.mnhs.org/preserve/records/docs\\_pdfs/recordservices/disaster.pdf](http://www.mnhs.org/preserve/records/docs_pdfs/recordservices/disaster.pdf)

- **Succession Policy**

- Why do you need one? Where are all your Society records stored? Many are at the home of the Secretary or on their personal computer. Who knows all your passwords to e.g. your Instagram account, Facebook page, website access etc. Only one person? What happens when this key person gets hit by the proverbial bus or elopes to Hawaii or has some other unexpected absence? This was brought home to me recently when a Secretary of a car club died suddenly, they had a rally on and the Secretary had all the details of the entrants on their home computer and no one could access it. What are your plans if a key member dies or resigns? Do you even know all the duties your key people undertake for the Society?
- What should the policy cover? Here are a few suggestions
  - what are the duties key personnel actually do for your society (not just the ones on their job description)?
  - what skills are required?
  - who is the back-up person
  - where are Society documents - both physical and on-line - stored?
  - who has access to to these documents
- Here are some policies relating to succession
  - Federation of Australian Historical Societies  
<https://www.history.org.au/Documents/SuccessionPlanning/FAHSSuccessionWorkbook.pdf>
  - Museums and Galleries of NSW  
<https://mgnsw.org.au/sector/resources/online-resources/volunteers/volunteer-succession-planning-how-guide/>
  - Our Community.com.au  
[https://www.ourcommunity.com.au/management/view\\_help\\_sheet.do?articleid=740](https://www.ourcommunity.com.au/management/view_help_sheet.do?articleid=740)

- **Oral History**

- Why do you need one? Why are you collecting oral histories? What do you do with them? Does the subject realise that they may be uploaded to your website? What if they say something inflammatory or libellous?
- Here are some policies relating to Oral History
  - RHSV – History Victoria Support Group  
<http://www.historyvictoria.org.au/socguide/procedures.htm>
  - Oral History Victoria <https://oralhistoryvictoria.org.au/>

- **Collection policies**

- Why do you need them? You have just established a local history society - what do you collect, how do you collect it, how do you get rid of things? Or alternatively, you have had a Museum for 40 years and now you are drowning under 'old stuff' that you have been donated and you need to cull, de-duplicate and focus on your main collecting areas. How do you do this?
- What should your collection policies cover? Here are a few suggestions
  - Collection policy - what do you collect
  - Acquisition policy - how do you acquire material
  - Appraisal/Evaluation policy - how do you evaluate if material is suitable for your collection
  - Access policy - who can access the material
  - De-acquisition policy - how do you get rid of material
  - Preservation policy - what procedures do you take to preserve material
  - Donation policy
  - Loans policy
- Here are some policies relating to all aspects of your collection.
  - Start here at the RHSV – History Victoria Support Group  
<http://www.historyvictoria.org.au/socguide/procedures.htm>
  - Altona Homestead <https://alhs.com.au/collection/>
  - Upper Yarra Museum  
<http://upperyarramuseum.org.au/collections-index/>
  - Casey Cardinia Archive Policies <http://seha.org.au/casey-cardinia-archive-collection-policies>
  - There are hundreds of policies on line, just google 'collection policy historical society'

- **Physical Building policies**

- Why do you need one? You will need an Occupational Health and Safety policy to cover the activities of your Society. If you undertake specific activities, for instance a heritage fair every year, you may need a specific policy for this and if you are holding the activity in a Council building, they may require this. Safety is everyone's concern.
- You may need a building procedures if you own your own building e.g. locking up procedure which could cover - what needs to be turned off, what are the security codes, who has access to keys etc
- Here are some policies relating to O.H. & S. and buildings
  - O.H. & S. – RHSV - History Support Group  
<http://www.historyvictoria.org.au/socguide/procedures.htm>
  - Building Security - RHSV – History Support Group  
<http://www.historyvictoria.org.au/socguide/content2.htm>
  - I haven't found a locking up procedure specifically for an Historical society but here's one from a Church  
<http://www.mybclc.org/wp-content/uploads/Locking-up-procedure.pdf>