



Philadelphia Yearly Meeting
of the Religious Society of Friends

Record Services Group

"The Record Services Group of Philadelphia Yearly Meeting (Quakers) oversees the collection, preservation, and future use of the records of Philadelphia Yearly Meeting and its constituent quarterly, monthly, and preparative meetings."



Directions for Clerks and Recorders of Constituent Meetings

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The [Records Services Group](#) of [Philadelphia Yearly Meeting](#) has prepared the following guide to assist Monthly Meetings in the care of their minutes and other important records. Minutes and related documents which meetings create and preserve today will be added to the heritage of the Society of Friends in the Delaware Valley. Most meeting records, some of which date from as early as the 1680's, have been deposited either at Friends Historical Library of Swarthmore College or at the Quaker Collection, Haverford College Library. Record keeping is a responsibility of all Quaker meetings, not only those belonging to Philadelphia Yearly Meeting. This guide has profited from practices and suggestions developed by others.

These guidelines have been revised several times over the years since they were first prepared by the Records Committee. They reflect the experience of knowledgeable archivists, including the staffs of the two Quaker libraries, and incorporate many of the current practices commonly used in the preservation of documents.

Monthly meetings vary in size and circumstances and may need to adapt these suggestions to their own particular circumstances,

in consultation with the Records Services Group or staff of the repository holding their records.

Why keep records

Friends have traditionally kept meticulous records of their activities to preserve accountability to other Friends for actions taken in our collective name and to uphold the truth of our actions to the world. In addition, records serve important historical and legal functions. They

- Document the history of the organization
- Establish legal rights for the organization, other bodies, and individuals
- Provide source material for the general institutional, personal and social history of the time

What records to keep

The most important records of a monthly meeting to be preserved are the minutes of the monthly business meetings, including attachments such as reports approved by the meeting. Other records typically kept permanently are

- Minutes of important committees such as Worship and Ministry
- Copies of marriage certificates, membership records, and registers of births and deaths
- Deeds and related property records
- Financial papers
- Important correspondence
- School records
- Materials documenting special projects that have shaped the life of the meeting

The volume and range of records to be kept will depend upon the structure and activities of the meeting. Meetings with larger programs may also generate a significant quantity of records such as personnel files, case files, and staff correspondence files.

Collection and maintenance of current minutes and reports

The Clerk of the Monthly Meeting or some other designated person is to be responsible for:

- Maintenance of minute books and other current records which may still be in the meeting's possession and copies of such records (either photocopy or microfilm) if the originals have already been placed in a depository library.
- Collection of committee minutes and reports
- Designation of any current records which should be kept permanently, forwarding them to the Recording Clerk or other person assigned to the preparation and care of the meeting's permanent records.

Non-acidic buffered paper, best for permanent records, is available at reasonable cost from most stationery stores. The repositories can help if there is a problem finding acid-free paper. Typed or computer-processed minutes are preferred, though clear handwriting is acceptable. Ordinary ribbon is satisfactory, and for handwritten minutes ordinary permanent ink is advised. Ballpoint pens are not recommended. Copies produced by laser printer and most dry photocopiers are archival, but the dyes used by many inkjet printers fade rapidly. Headings for important subjects and sequentially numbered paragraphs facilitate their location later. To make binding easier, there should be a margin of 1-1/2 inches on the left side of each

page and also on the right side overleaf if both sides of the paper are used.

The worst enemies facing preservers of records are poor quality, acidic paper and the atmospheric environment, especially high temperature and high humidity, conditions under which mold and mildew flourish. This is why non-acidic paper, good quality ink, and the proper storage conditions, such as are found in the archival areas of the Quaker libraries at Haverford and Swarthmore, are so important.

Pictures, clippings, and related items should be filed separately from other records. However, such materials can be valuable for the meeting's archives. They should be stored in non-acidic folders or boxes and may be forwarded with other records periodically to the depository libraries. It is desirable to photocopy clippings and other short-lived materials before they deteriorate. Scotch tape and other pressure sensitive adhesives must not be used, because they are very acidic and deteriorate rapidly. Since ordinary metal paper clips rust, use plastic clips only. Before attempting repairs to paper or bindings, please consult the meeting's repository for advice.

Maintenance of membership records and related statistical data (usually the responsibility of the Recorder)

- *Forms:* The Yearly Meeting Office can offer advice about the very important task of maintaining an accurate and current membership file. A sample [membership](#) form and [certificate of transfer](#) are available. Meetings can also use the forms in the *Handbook on Records* published by the Baltimore Yearly Meeting Records Committee as a model for preparing their own. Completed forms for former members may be forwarded to repository at any time, but the Recorder should

probably retain a copy at least throughout the members' lifetime.

- *Membership reports:* Membership statistics should be reported annually to the Yearly Meeting. The Yearly Meeting will provide forms on which to do this, and the Recorder should keep copies for the monthly Meeting's own records.
- *Marriages:* Copies of marriage certificates for weddings held under the care of the meeting become part of the permanent records. Photocopies or handwritten copies are acceptable. These certificates are historically valuable as a source of genealogical information, as confirmation of Meeting/friendship networks, and in order to reveal variations in marriage practices.

Histories of the meeting and recollections of members, voluntary activities which might be the task of the Historian, if the meeting has one.

- *Historical items* such as pictures, sketches, or clippings from local newspapers of articles concerning the meeting, or its members, worth preserving should be included with the meeting's archives.
- A short *written history of the meeting* would be a valuable resource for the meeting's use and for inclusion in the holdings of the Quaker libraries.
- *Diaries and tapes* that record recollections of older members, *programs* of important events in the life of the meeting, and the like, are also of value and interest. Some may warrant permanent preservation in the meeting's archives or at one of the Quaker libraries.

Each meeting should make it a practice to remind members at monthly meeting of the importance of turning in items of historical significance.

Where to deposit records

The Records Services Group urges each meeting within Philadelphia Yearly Meeting to select either the [Quaker Collection of the Haverford College Library](#) or the [Friends Historical Library of Swarthmore College](#) as its official repository. They are maintained under archival conditions and are organized, described and interpreted by professional staff members who understand the Quaker context of their origin.

When to deposit records

- *Minutes and related records kept by the clerk or recording clerk:* The Records Services Group recommends that meetings deposit their original minutes, committee minutes, financial records, etc. every three to five years or whenever there is a change of the clerk responsible for keeping the records. The meeting may wish to retain a photocopy for local use.
- *Membership records:* The meeting recorder generally files separately the record forms for those whose membership has ended for whatever reason (death, transfer, resignation). The ceased membership file should be deposited once every five to ten years.
- *General historical materials:* Historical materials should be deposited as soon as the meeting no longer needs them. Meeting histories, etc., should be deposited when produced.

How to deposit records

Meetings may send their records to their repository by registered mail or by any delivery service that maintains a tracking system (UPS, FedEx, etc.). Call ahead if depositing in person to ensure that the library will be open. Be sure to include a return address; the receiving library will issue a receipt for all records received.

Microfilming records

According to modern archival practice, important original documents are usually safeguarded by not allowing researchers actually to handle them physically. Instead, users inspect the records on microfilm and ask for hard copies of those pages they want to take home. These pages are then printed from the film. That is why meeting records entrusted to either the Friends Historical Library at Swarthmore College or the Quaker Collection at Haverford College should be microfilmed. Minutes of business meetings and records of vital statistics are used most heavily by researchers and are the first priority for filming. Ideally four copies are produced: a preservation archival master, which is kept as archival record; a printing master used to make additional service copies; and two service copies, one for each of the depository libraries, to be used for research. The depositing meeting will usually pay for the making of three copies, while the additional service copy is paid for by the Records Committee from a special fund.

The basic cost for making 3 microfilm copies currently averages \$.20-\$.25 a page, depending on a number of factors. Assuming that your meeting generates 50 pages of business minutes and vital statistics a year, the cost would come to between \$10 and \$12.50 per year. The Records Committee recommends that your

records be deposited at either library every 3 to 5 years but that filming take place every 10 years so that each reel will be more filled. Otherwise a meeting's records could be scattered across several reels. Archivists at Haverford and Swarthmore will cooperate with each monthly meeting to determine when enough of its records have accumulated to make a reel and will provide an estimate of the total cost.

Meetings which find the cost of microfilming prohibitive may then request assistance from the Records Committee. Please note that the Quaker depositories at Haverford and Swarthmore Colleges contribute the costs of preparing the materials for filming (no inconsiderable expense), for coordination with the vendor and for quality control of the microfilming. (*Approved by the Records Committee of Philadelphia Yearly Meeting, 1997*)

Authority for permission to copy the records of the constituent meetings of Philadelphia Yearly Meeting (i.e. monthly meeting records) remains with the individual meeting. The Records Services Group encourages monthly meetings to grant permission for microfilm copies for legitimate scholarly use or for deposit in local historical societies. Staff of the repositories are happy to help meetings handle requests for duplicate microfilm. (For further details see the [Policy on the Reproduction of the Records of Philadelphia Yearly Meeting.](#))

Confidentiality and restrictions

The Records Services Group has developed a policy for restricting for 75 years access to certain categories of records that would affect the privacy rights of individuals. Records covered by this policy include Worship and Ministry and Overseers minutes, clerks' correspondence, personnel files, social service case files, donor files, student files, medical records, etc. Meetings can suggest additional categories of

records for which restrictions may be suitable. No meeting should refrain from maintaining or depositing records for fear of confidentiality issues. For further information, contact the Clerk of the Records Services Group or the appropriate repository.

Questions

Staff of the repositories serve as liaisons to the Records Services Group and are happy to assist monthly meetings in the preservation of their records. Click on their names for more information, including hours of service, telephone numbers, and staff listings

[Haverford College, Quaker Collection](#)

[Swarthmore College, Friends Historical Library](#)

These depositories are in the process of developing a joint, online series of finding aids to help Clerks and Records know what records are available and where they are deposited. This resource is still very incomplete, but work is proceeding with an estimated completion date of 3/2005. For a sample, please click on:

<http://trilogy.brynmawr.edu/speccoll/pymm.htm>