A Tool-Kit for Researchers

This Tool-kit is designed for anyone interested in researching the way in which working people have acted together to change their lives or in support of political goals. It is based on the Popular Politics Project funded by the National Lottery Heritage Fund and the examples and materials that are used in this toolkit draw their inspiration from the practical steps that were taken by project leaders and volunteers. While we use these examples, the ideas and strategies will work in a way that can be used for any project designed to help people use historical archives or undertake oral history projects.

Popular politics represents a major dynamic force throughout history, because by combining together, people can change the pattern of history. Sometimes this is in defence of shared interests (eg. Trade Unions) or represents a reaction against certain trends, for example Fascism in the 20th century, or the anti-Catholic Gordon Riots of the 18th century.

More often, popular politics is about advancing the material or cultural welfare of working people, and includes self-help initiatives such as Friendly Societies, the co-operative movement, franchise reform, education, health and safety at work (especially for children), and general improvements in working and living conditions including better sanitation, housing and employment protection.

The history of all these popular political movements still impact on our lives today, giving us legacy of democratic politics and a welfare state in which the National Health Service continues to enjoy wide popular appeal.

Using the Tool-Kit

Our region is rich in archive and oral history records that anyone can access to document or research popular politics over the last 250 years.

This Tool-kit is divided into two parts. The first will guide you through these regional archives, and provide guidance notes for anyone interested in:
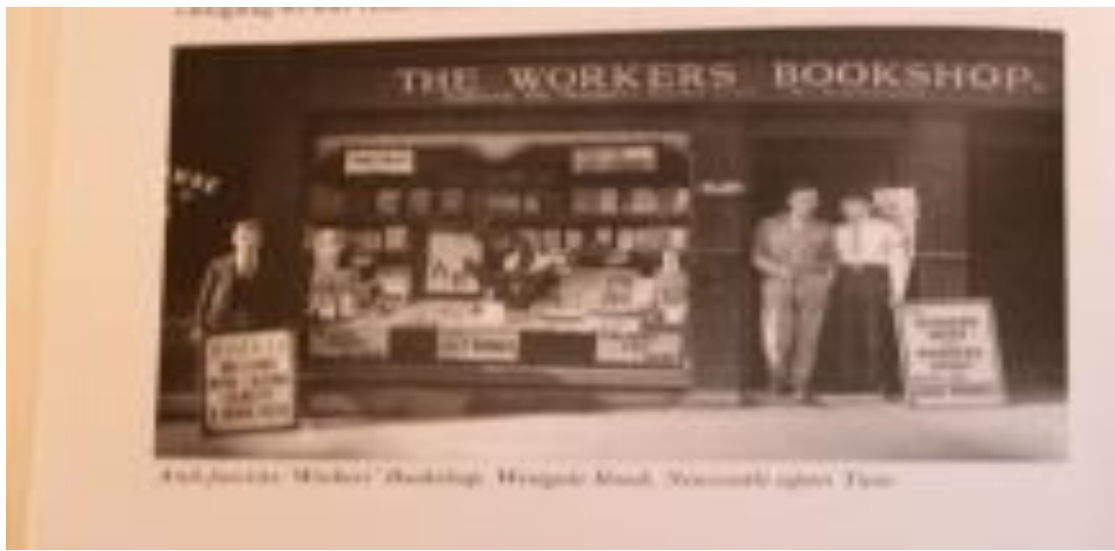
- Identifying archive collections within the region
- Visiting regional archive collections
- Teaching social history
- Discovering regional history
- Setting-up a research project
- Oral history, and how to create new oral history records
- Celebrating personalities of local figures, such as politicians, welfare reformers, trade union leaders
- Documenting relevant archives in your community
- Writing a history of your local trade union branch, or co-operative store, or Friendly Society

The second part of the toolkit will help you work through a strategy for developing an oral history project.

ARCHIVE MAPPING
& RESEARCH
TOOLKIT FOR VOLUNTEERS

PROJECT AIMS:

- *To map the incidence of popular political events (drawn widely) and persons in the regions communities, archives, libraries and museums.*
- *To find, record and transcribe the personal narratives of living participants in political parties, movements and campaigns.*
- *To find relevant material in private hands and encourage its owners to donate it to the appropriate archive.*
- *To collect the material and package and display it to make it widely available to the community.*
- *To involve the maximum number and variety of members possible to undertake the work.*

[caption illegible] Workers' Bookshop, Westgate Road, Newcastle upon Tyne.

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ARCHIVE SEARCHING

Note: MAL = Museum, Archive, Library, Local Studies Centre

Introduction

The main purpose of the toolkit is to identify the materials in a range of archives. The use of the word archives covers libraries, local study centres, museums, and record offices. As a result a bank of primary and secondary material will be created which will enable members of the public, academic and non-academic historians, archive staff and workers in the wide range of cultural industries to carry out detailed research culminating in books, articles, pamphlets, displays, website material, art works, fiction and poetry, music and dance, etc.

Archive Searching

Archive searching involves looking at the paper and web catalogues of the participating archives using key words, existing knowledge and intuition.

Catalogues

Each archive has developed a different approach to cataloguing the collections of personal, business and organisational papers and other material.

Most will have a mix of catalogue systems: print, card, web. Some will have all or part of their print based catalogues on the web and have still kept the print catalogues. Some may have dispensed with or no longer add to print and card catalogues.

Print catalogues are the easiest to go through as it is simply a question of carefully going through them page by page. Card catalogues allow more specialist topic research.

While books and pamphlets in libraries and library sections of archives will have a standard library coding system, most will have their own coding system for the archive materials. A few may do it by subject with no coding.

Each set of papers and other materials acquired by an archive through loan or deposit is normally given an accession or acquisition code. Where the archive has been able to index every item in the acquisition there is a hierarchy of sub-codings under that main code. This makes it easier to look for key themes, topics and word within each archive collection. Many archives have not been able to create detailed indexes of all their acquisitions. This makes searching much more difficult – each acquisition collection has to be gone through to see what its contents are. This is very time consuming and this is where knowledge and intuition come in.

Web Catalogue

Each web based catalogue has a search facility, which enables a key word to be entered. If the key word exists in the catalogue, the relevant item(s) will be shown. However, the search tools on some web based catalogues will only highlight the full spelling of a word, not part of it. For example if you searched 'rail' as a general word hoping it will identify 'railway', railways', railwaymen', it might not do so, in which case each of the specific words will have to be searched for. Web catalogue searching can be very time consuming.

Print Catalogue Searching

Print catalogue searching involves going through the catalogue volumes page by page. Even where web based catalogue searching has been carried out, the nature of the exercise will mean that not all relevant items will have been found. Much relevant material for the project will be found hidden in what do not appear to be obvious collections, or in collections which have not been indexed in the catalogues. This will become more obvious as detailed information is built

up about popular politics.

The Popular Politics Approach

Different approaches will be taken at each archive as their cataloguing systems differ.

Key Theme/Topic/Word List. In general however we will work from a list key themes, topics and words that will help identify the relevant material in the catalogues. This list is attached as Appendix 1. It can be amended and updated to enable further identification of material as new themes, topics and words are identified. A small example from searching some key themes, topics and words on the Teesside web catalogue is set out below (in the appendix?).

Catalogue Listing. This can be used to list the items that are found along with a relevant code for the archive. Here is an example from the Popular Politics Project:

PRN = Project Reference No
NCS = Northumberland Collections

PRN A	NCS Ref No	Papers	Notes
1	1DE	**Delaval Family Papers**	
2	1DE/4/6/12-17	George Delaval as envoy to Portugal, Emperor of Fez and Morocco etc 1698-1710	This may give information on Arab/N/African slavery
3	2DE	*Delaval Family Papers*	These papers need to be looked at in detail
4T	2/DE/4/1-57	*Inc. Peace treaties concerning the Atlantic world*	
5	2DE/4/8/31	Ships	P/R
6T	2DE/4/9/1-34	Letters and notes to J H Delaval MP (1757-1804) to support various parliamentary bills	
7	2DE/4/9/1-68	Letters and notes. J H Delaval. 1778-1779 inc re Paul Jones	Jones American navy

Individual Item Form. This is used for two purposes:

(a)   to record detailed information about an item or an acquisition collection than is recorded on the Catalogue Listing.
(b)   to be the starting off point for any more detailed looking at the material.

Completing the Forms

Detailed explanations are given in the two sections which follow this one.

Word-Processing Forms

Individual forms can be completed by having the basic format on a computer and completing them by word processing. Otherwise, printed forms can be used and completed in neat handwriting.

LISTING FROM THE CATALOGUES

Introduction

Creating lists of relevant items is an essential component of building the information about what resources there are in each MAL.

Some of the themes looked at during the Popular Politics Project cut across a range of different types of records. For example, we know that cholera outbreaks in the 1830s, 1840s and 1850s had economic and social effects including on the activities of the local government, civil society and political organisations. A number of activists and supporters died. Fund raising will also have been adversely effected. The records that could be looked at will not necessarily state they have anything to do with cholera in them. But the records of town councils, poor law guardians, town councils, hospitals, organisations, letters, and diaries for the particular years when cholera struck parts of the North East will be in files for those years.

Each collection has its own catalogue number. Most then have sub-lists with additional numbers e.g. the collection may have the number:

ACC 10. Poor Law Guardians

It may then be divided into sections. e.g. :

ACC 10/1. Minutes 1835-6   Or Minutes 1835-6

ACC 10/2. Minutes 1836-7   Or Correspondence 1935-6

ACC 10/3. Minutes 1837-8   Or Minutes 1836-7

You may not need to list each of these sections – just, for example:

ACC 10/1-3 Minutes 1835-8   Minutes & Correspondence 1835-7

In some catalogue listings correspondence might be sub-listed stating who the letter was from, to whom, the date and sometimes the subject matter. The catalogue numbering therefore might look like this:

ACC 10/2   Correspondence 1835-6

ACC 10/2/1   Letter from (name) to (name) 4 April 1835. Reply to allegation of maltreatment in workhouse

ACC 10/2/2   Letter from (name) to (name) 6 /4/1835. Reply re-allegation of maltreatment in workhouse

In this case you would not list all the correspondence but would record:

ACC 10/2/1-2   Correspondence 1835-6, re-allegation of maltreatment in workhouse

The decision on what to record is partly a combination of copying detail from the catalogue, and

summarising what is detailed in the itemised individual collection.

The following is a practical example relating to the Hodgson family records from the archive mapping (catalogue listing) at Tyne & Wear Archives. This shows the kind of detail and summary required. This enables you to add in a notes column details of the relevance and what needs to be looked at.

TWA ACC 13	**The Hodgson family (inc Thomas)**
13/1-10	Personal records of Hodgson family. 1778-1890
13/11-21	Correspondence. 1775-1899
13/22-43	Financial Records. 1773-1868
13/44-47	Deeds (and wills)
13/48-50	Miscellaneous
13/48/1-7	Summons to Chancery of Thos Slack, Richard Manistry & others
13/51-60	Miscellaneous
13/55/54	Notes on local poetry,poets and sermons, 1816-1834
13/60/1-3	Notes on public speaking & press freedom n.d.
13/61-63	Miscellaneous
13/61/1-3	Notes on Newcastle Water supply n.d.

Sometimes a collection may simply be a list of Minutes or ledger books. There is usually no need to list every line. Simply summarise e.g.:

X/Y/1-20   Poor Law Minutes 1836/7 to 1855/6

How Do I Order Items?

You order the exact catalogue reference number of the item. e.g.

Main catalogue number ACC   ACC 10. Poor Law Minute

Item to be ordered   ACC 10/1 Poor Law Minutes 1835-6

COMPLETING INDIVIDUAL ITEM FORMS

Archive Item Form

The current form has been designed for loading the data on to a database.

1.   Keep all text within the table.
2.   Each box line in the table will expand in size as you enter information that needs more than one line within the box.

How Much Detail Should Be Included On An Archive Item Form?

The detail you write will depend on the content, nature and relevance of the item and your own interest in the detail. While the key word section and detail will be important for future researchers to enable them to make a decision as to whether to look at the original item, the detail is useful in helping to assess the multiple interconnections between issues, themes, individuals, organisations and networks.

How Will I Know Whether What I Have Done Is Of Value?

This depends on the aims of your project and the targets you have set. Three examples from the Popular politics project that show how things might develop or link up are given below:

1.   (Police batoning demonstrators early 1920s.) This is a window on to wider issues relating to the struggle of miners and campaigns over the Poor Law across the country in the 1920s (inc. the Poplar Councillors going to prison). The baton charging is a feature of other demonstrations in the period. The policing of demonstrations and strikes across the decades would make an interesting research topic, linking through the unemployed struggles in the 1930s, to the Miners' Strike in the 1980s.

2.   (Letters between British and American Quakers.) While these letters may not seem very relevant, it was the Quakers' links with their American co-religionists which were an important way in which information came to Britain about slavery and the abolition movement in the United States, enabling the North East in particular to give a warm welcome to black abolitionists like Frederick Douglass and William Wells Brown; and the way in which English support for US emancipation was fed back into US Quaker and abolitionist circles, where it was much appreciated.

3.   A letter from Thomas Clarkson about promoting Quakerism on one of his trips. Clarkson's years of travelling 30,000 miles around the country was in the anti-slavery cause. This is an interesting added dimension in that he was keeping an eye on other agendas to promote as well. Given his support for the French Revolution it would be interesting to find out whether there is any evidence of him talking radical ideas on his travels. He fell out with Wilberforce over the Revolution, and Wilberforce shut down the London Committee not wanting abolition to be tainted by association with the Revolution, leading to a lull in the popular campaigning.

RESEARCH GUIDANCE

Introduction

An active participation in research was one of the important ways in which members in the 2007 Tyne & Wear Remembering Slavery project were able to gain a better understanding of the contents of archives. These participants have gone on to publish a book and essays, to give talks and to continue their own research topics since. They are co-ordinated through the North East Slavery & Abolition Group.

Why Might You Want to Undertake Detailed Research?

You have an appetite for knowing more and obtaining a better understanding of history, You have an interest in: family, industrial, local, labour movement, co-operative, radicalism, educational, feminist, oral, black, etc history. You are particularly interested in history from below and people centred history. You appreciate that history is a dynamic process.

Historical research is not the preserve of academics and research students. You do not have to be an academic to make important contributions to historical knowledge, understanding and debate. Academics can often get it wrong and many acknowledge their debt to the work of 'amateurs'. There is no such thing as complete 'objectivity'. The dynamic of history is partly about political differences and processes. All academics bring their own values and biases into the way they research, analyse, write and broadcast.

Organisational History Is a Dynamic Process

The history of each organisation created by working people to defend their interests is rich and complex. Their histories should be looked at critically because like individuals, organisations have warts and blemishes.

Here is just one idea of the ways archives and popular history can be explored and the numerous avenues it opens up for exploring in the archives.

Each organisation is a vehicle to achieve an end.

- That basic end may be the protection and improvement of the wages and working conditions of their members, or improvements in community life, or the promotion of education.
- But organisations often take on many other roles as well in addition to their core ones.

They are arenas for conflicting political outlooks over tactics, strategy, about whether they should take on wider roles, and between personalities. But it is amazing how many organisations have shown themselves to be remarkably resilient.

What are some of the problems involved in running an organisation. e.g. a trade union:

- The Annual Conferences, the Executive Committees and the General Secretaries of trade unions have a large number of conflicting priorities to balance.
- They have had to work hard to recruit and maintain members.
- They have been adversely affected by periods of economic recession and large-scale unemployment.
- There are small periods of massive strike activity reflected mass discontent with wages and working conditions.
- Many started small and locally and found it necessary to merge with others, and later national unions did the same.

It has taken a long process for the big unions of today to arrive at where they are at. Unite and Unison, for example, do not just have their own histories, but those histories also include the histories of their predecessor unions.

The history of trade unionism cannot be separated from the history of other forms of working-class organisation, like friendly societies and co-operatives, nor from the histories of political movements, especially Liberalism, Radicalism, Socialism and Communism, nor from the fluctuating attitudes of Governments. There is a continual process of interaction. At some points they are inseparable.

Individuals are often members of more than one organisation.

Organisations can operate on issues of common concern.

Individuals and organisations often operate across local administrative boundaries, at district, regional and national level.

New people moving into an area can bring with them theories and ideas for practical action shaped by their experiences in the areas they have moved from, and the organisations active in those areas.

While some workers will live and work the district they live, others will travel to other districts to work, and therefore may be members of local political and community organisations in the areas they live, and members of their trade union in the area they work.

Different districts seem to have their own different dynamic for political and social development, so that there are as many, usually more, differences than similarities.

While organisations and movements are dogged by false-starts, dashed hopes, blind-alleys, defeats, and lots of back-biting and personality clashes, there remain activists dedicated to continue to organise and fight for a better society.

There is always a great danger when looking at organisations to overlook the interlinks with others through joint activity, through overlapping memberships.

Think of the interconnections in terms of the modern jargon of 'networking'.

What Research Do You Want to Undertake?

What are you interested in?
- a particular individual
- an organisation
- a movement
- an event
- an issue/theme

You can carry out your own research in various ways to support working in archives.

- reading articles, books and pamphlets already written
- detailed research in the archives
- research on the web
- making notes to build up a framework
- identifying details you want to look at in more detail
- asking Library/Archive staff for help
- reading books borrowed books through the Inter-Library Loan system

Some tips:

- Do not rely on indexes
- The more widely you read, the more the inter-links and cross-connections you will see adding depth and in-sight
- When making notes you might find it useful to use a separate sheet or create a separate computer file for each organisation and individual.
- When making notes always mark source: name of author, title, publisher, year of publication

and page, and if in an archive collection, name of archive and archive catalogue number
- Write-up the material as you go along to become familiar with it and to ask questions about it to be followed up.
- Collect postcards and memorabilia

Where to Find Information

- General and specialist secondary books
- Journals
- Histories of Organisations
- Local Histories: Can be useful in charting aspects of the economic, social and building development of the area
- Biographies and Autobiographies
- Historical Dictionaries
- Business Histories
- Local Newspapers
  - Absence of coverage does not mean nothing was happening
  - Assess their political prejudices
- Organisations Newspapers, Journals, Publications, Minute Books etc

Read everything with a pluralistic lateral thinking approach.

WEB AND HOME BASED RESEARCH

Introduction

Much research can be done nowadays without moving out of your chair at home particularly if you have access to the internet.

Searching Web Catalogues

The main activity that can be done at home is to search the web catalogue of an archive, local study centre or library using key words and prepare a list of the records found that contain those key words. The most common method is key word searching see Appendix 1.

If more than one person is involved in a project then it seems sensible for each individual to take responsibility for 3 key words and look across the entire web catalogues for them. This will ensure that there is someone familiar with the range of key word material across the region and be able to identify duplication of material.

Some key words will identify material that may not appear to be relevant. However if it is ambiguous it is best to record it for later double checking.

The form that is used to record catalogue listings is in the Appendices.

Other Types of Web Research

Using key words coupled with the use of villages, towns and cities or geographic sub-areas in the North East will help you see what material is relevant to your project. This will help you become more familiar with aspects of North East and make it easier to understand documents you may be able to look at later.

Here is an example using Google:

Chartism + "North East" reveals:

- The impact of Chartist on Mid 19thC Brompton weavers:www.communigate.co.uk/ne/bromptonbynorthallerton/page29.pphtml
- A new book *Three Rebellions*, which includes the revolt in Canada 1837-8: http://richardjohnbr.wordpress.com/2010/01/29/three-rebellions
- A short essay comparing 1832 with the new political situation in Britain with an emphasis on Earl Grey: http://richardjohnbr.wordpress.com/2009/05/22/an-1832-moment
- Janette Lisa Martin's thesis completed in January 2010, *Popular political oratory and itinerant lecturing in Yorkshire and the North East in the age of Chartism, 1837-60*: http://etheses.whiterose.ac.uk/834/1/CORRECTEDthesis.pdf.

Background Reading

The above findings highlight the need to keep an eye on relevant new books and other writings.

Using Your Local Library

Your local library may have relevant books and pamphlets you want to read or you can order them through the Inter-Library loan scheme.

For those of you who live in small towns and villages you may want to read all the local history published material on the area in order to build up the story of your project there.

Building a Bibliography

During a Project it is a good idea to build up a bibliography of books, essays, articles, pamphlets, including those written:
- by participants
- by enthusiasts, historians, social scientists, journalists and others.

There are several ways this can be done.

- items in bibliographies in published material
- items in the *Bulletin of the Society for the Study of Labour History*/*Labour History Review* (articles, book reviews, and the annual lists of publications and theses)
- essays and reviews in *North East History* accessible on the web-site www.nelh.org
- essays and reviews in *Northern History*
- essays and reviews in *International Review of Social History*

If you have a reader's ticket and can get to a University Library you can consult the journals there. Most are also on-line but a University reader's ticket is needed to access them on-line. *North East History* is also available at most public libraries and regional archives and an index of articles is available on the NELHS web-site at: www.nelh.org

The items found should be listed in alphabetical order by author to make it easy to merge everybody's lists into one bibliography, using the form in Appendix 4.

APPENDIX ONE

KEY WORDS/THEMES/TOPICS

Key Word/Theme/Topic	Covers (inc)
Agricultural	Conditions, labourer, minimum wage, worker, wages, unionism; Corn Laws
Chartism/t	People's Charter; National Convention; National Charter Association; Land Scheme; physical and moral force; (Grand National) Petitions
Charity	Charities, philanthrophy, subscription/s. mutual aid, poor, clubs (benefit, coal, sick)
Colonialism	Popular support for; anti-colonialism.
Community development/work	Settlements, projects, campaigns
Co-operative	Co-operative agricultural, industrial, productive, retail and wholesale societies; co-operation; co-operator(s); Co-operative Union; Co-op Party; Owenism/ites
Commons, Open Spaces & Enclosures	Campaigns to protect commons and open spaces,
Culture	Cultural activities: ballads, choral, brass, orchestral, vocal, art, drawing, dance, theatre, plays, music, novels/fiction. Organisations. Clarion newspaper and linked organisations (e.g. Cyclists, Cinderella clubs)
English Civil War/Revolution	Levellers, Diggers, Ranters, democracy, conquest of Ireland, Jamaica, John Lilburne (Leveller leader), regicides
Education	Workers, Workers' Educational Association (WEA), Labour Colleges, Ruskin College, University Extension Classes, Plebs League
Elections	Posters and other election material. Manifestos. Local, Poor Law Guardians, County, Parliament.
Environment/Green	Organisations, campaigns, issue
Financial organizations	Mutually owned: building, coal (clubs), deposit, insurance, medical, land, loan, savings
Friendly Society/ies	Oddfellow, Forester, Druid, Buffalos, Shepherds, etc. Often call themselves 'Order of'. Often referred to as benefit societies. Branches often called: lodges
Freemasons/Freemasonry	Branches called Lodges
Health	Campaigns re-pre-NHS health services; pre-

	NHS local government, charitable and mutual health services fundraising; birth control; anti-vivisection, anti-vaccination; health & safety; National Health Service
Internationalism	American & French Revolutions. Paineites, 19thC: esp. France, Poland, Hungary, Italy & Russia, Ameircan Civil War, Soviet Union.
Irish	Workers; navvies. Famine. Fenians, Home Rule. Independence. Republicans/ism. Orange. Civil War. Civil rights.
Land	Nationalisation, community ownership. Thomas Spence, Chartist Land scheme, mutual building societies
Political Party	Labour (LP), Independent Labour (ILP, Socialist Democratic Federation/Party (SDF/SDP),Communist Party, Co-op, Commonwealth, International Marxist Group (IMG), International Socialists (IS), Socialist Workers Party (SWP), Socialist Labour League,Socialist Party of Great Britain (SPGB), Liberal, Conservative (Municipal Reformers)
Mines, mining, miners	Wages negotiations, strikes, trade union and welfare organisations, support groups, strike-breaking, blacklegs
Newspapers & journals	Organisations, Radical, anti-stamp agitation, press freedom
Radical/ism	Republicans/ism. Thomas Spence. Robert Lowery. Joseph Cowen. Robert Spence Watson. W. S. Adams.
Reform	Reform, Reform Act (1832), Reform League (1860s), Reform Act 1884
Religion	English Civil War; civil etc rights of dissenting sects (Quakers, Baptists); social action of sects and Methodists, Presbyterians. Anti-Catholicism. Catholic Emancipation. Secular societies. Secularists. Humanists.
Riots	Bread & food, political, anti-enclosures, anti-poor law, unemployment, Luddites, Captain Swing, anti-Catholic, political demonstrations
Slavery & abolition	Slave trade, American colonies, West Indies, Cape Colony/South Africa, emancipation, plantations, sugar, cotton, free produce, Middle Passage, manumission, black liberationists, anti-slavery/negro friends societies, revolts, American Revolution/War of Independence,

	American Civil War, Brazil, Cuba. - already done in Lit, Robinson, N/land Collections, TWA
Socialism/ist	See also Political Parties. Owenism, Marxism, Christian Socialism, Fabian, Syndicalism, Guild, Trotskyism. Sunday Schools. Municipal. Gas & water.
Strikes/Labour Disputes	General Strike (1926). Miners.
Suffrage/Women's movement/women's liberation	Universal, women (suffragette); Women's Social & Political Union (WSPU); Women's Freedom League. Socialist Women's Action Group; Women in Black; women's groups
Temperance/teetotalism	United Kingdom (UK) Alliance, Rechabites, Sons of the Phoenix
Trade union	Names often inc: Associated Society, Amalgamated Society, Operatives. Branches often called lodges. Abbreviations inc: ACE, ASE, ASRS, ATUBW, GMB, GRWU, IWW, NUM, NUR, TGWU. Trades Union Congress. New Unionism (1889-92). Great Unrest (1911-13).
Working conditions	Wages, health & safety, pensions, sick pay, disability
War	Anti- & pro-war campaigns. Crimea. Boer. 1St & 2nd World War. Suez, Korea, Vietnam, Iraq.

APPENDIX TWO

KEY WORDS, THEMES AND TOPICS – TEESSIDE ARCHIVES TEST ILLUSTRATION

The following is based on a search of some of the key themes, topics and words in the web based Teesside Archive catalogue accessible via the National Archives Archon Directory: www.nationalarchives.gov.uk/archon/searches/locresult_details.asp?LR=20.

Key word/theme/topic	Print	Web	Relevant catalogue references
Conservative		/	Primrose League: Cleveland habitation. 1886-8 register of members. In U.PEN
Culture		/	Stockton Vocal Union: minutes, financial records 1936-2000
Education		/	Workers Educational Association: Middlesbrough branch.
Election		/	DC.TT/22/2 – Thornaby Borough Council
Employers		/	Dorman, Long & Co Ltd, coal and iron masters, iron, steel and wire manufacturers, bridge builders, Middlesbrough: directors' minutes 1889-1956
		/	Corus Group plc, steel and aluminum manufacturers: records of predecessor iron and steel companies 1808-1970 (U/BSC
			Steel Companies: reports, accounts, photographs 1900-1950 (Acc 6346, 6357, 6379)
Friendly society		/	National Deposit Friendly Society: Middlesbrough branch. 1902-56.
		/	Independent Order of Oddfellows: Middlesbrough. 1874-1972.
Labour Party		/	Middlesbrough Independent Labour Party. 1898-1913.
		/	Cleveland Divisional Labour Party.
Trade Union		/	Hartlepool Trades Council.
		/	TGWU 1921-75. U/TGW Cleveland Miner's and Quarrymen's Association. 1873-1960. U/CMQ Copy of reports and requests from National Amalgamated Worker's Union, National Union of General Workers, National Federation of Building Trades Operatives, National Amalgamated Operative Street Masons, Paviors and Roadmaking Society, re wages and conditions In Thornaby Borough **DC.TT/44/38** TGWU & others in Cleveland Transit Records 1919-1986.. **DC/J/CT**
		/	Associated Society of Locomotive Engineers

		and Firemen: Hartlepool branch U/ASLEF 1919-68
	/	Plumbing Trades Union: Middlesbrough lodge. 1933-70. U/PLUM
Wars	/	DC.TT,.45 (Boer) War and Peace Celebrations
Women	/	Standing Conference of Womens Organisations: Stockton and District. Minutes.. 1944-92

APPENDIX THREE

CATALOGUE LISTING FORM

Name of Volunteer:

Name of Archive/Library/Local Study Centre

Catalogue Ref No	Title of Papers	Notes

INDIVIDUAL ITEM FORM

Project No	
Title*	
Author	
Location of Resource*	
Catalogue Reference*	
Source	
Publisher, publication place and date	
Printer and printing place	
Format*	Options: (Printed Tract, Printed Pamphlet, Book, Booklet, Newspaper, Newspaper Cutting, Hand Written Letter, Typed Letter, Handbill, Poster, Image, oral history recording, "film")

	Yes			No	
Contains Images:					
	Yes	No		Yes	No
engravings			photos		
sketches			postcards		
maps			film, video, etc		

Digital copy available?	
Volunteer*	
Date record created*	
Place Names	
Peoples Names	
Organisations Names	
Detailed Summary and extracts of text if relevant to do so*	

INDIVIDUAL FORM NOTES

(*) Items marked with an asterisk are ones which must be filled in.

Project No	The database will automatically generate a number
Title*	Full name of item
Author	
Location of Resource*	This is archive/library
Catalogue Reference*	This is the archive/library
Source	If the item is in a collection e.g. of letters state what the collection is e.g. name of estate papers
Publisher, publication place and date	Sometimes there is more than one publisher
Printer and printing place	Ditto. Sometimes the printer is the same as the publisher. If there are several publishers/printers, then there will be more than one publication place.
Format*	Please use the relevant one form this list: Printed Tract, Printed Pamphlet, Book, Booklet, Newspaper, Newspaper Cutting, Hand Written Letter, Typed Letter, Handbill, Poster, Image, oral history recording, "film"

	Yes			No	
Contains Images:					
	Yes	No		Yes	No
engravings			photos		
sketches			postcards		
maps			film, video, etc		

Digital copy available?	If there is one it will state so in the library/archive catalogue
Volunteer*	Your name
Date record created*	This is the date you looked at the item and recorded the details
Place Names	This relates to place-names mentioned in the text. They will enable us to match items to particular locations as part of building up village, town, district studies.
Peoples Names	This relates to the names of people mentioned in the text. This will enable us to see who is involved, their connections and networks and enable the building of mini-biog sketches.
Organisations Names	This relates to the names of organisations mentioned in the text. This will enable us to see which organisations are mentioned across a wide range of material so we can look at them in more detail. Names of organisations include references to Quakers, Catholics or Methodists, trade unionists, co-operators as collective groups (i.e. not as individuals.
Detailed Summary and extracts of text if relevant to do so*	- Please type details in this box. The box will expand as you type - If a document has a small amount of text that is relevant you can transcribe it - Please do not add personal comments – make those in the email you send the file with to Sean Creighton - If there are a list of subscribers to the 18th & early 19thC printed document you are looking at please list them - If a document (e.g. a long tract/pamphlet, or book) is very long and has chapter headings, please list the chapter headings - If there are several linked papers (theme and sequence) in a collection of papers then put the details in the same form.

Project No	
Title	"A letter from a reformer to a radical on the Newcastle Meeting" of 11th October 1819. Subheaded "A word on the other side"
Author	Anonymous, signed "a reformer"
Location of Resource	Newcastle Central Library Local Studies
Catalogue Reference	Local Tracts vol. C36 (L042) – No. 4 in volume. X329.942
Source	
Publisher, publication place and date	Not given
Printer and printing place	Edward Walker, Pilgrim St., Newcastle-upon-Tyne
Format	Pamphlet

	Yes	No
Contains Images:		

	Yes	No		Yes	No
engravings			photos		
sketches			postcards		
maps			film, video, etc		

Digital copy available?	
Volunteer	
Date record created	
Place Names	Town Moor
Peoples Names	Mr Pitt, Jonathan Swift, Mr MacKenzie, chairman of the meeting; Mr Marshall; Mr Layton, of North Shields; Mr Hodgson; Mr Preston, a banker; The Reverend Mr MacPherson, dissenting minister.
Organisations Names	
Detailed Summary and extracts of text if relevant to do so	Hostile account of a radical mass meeting held on Newcastle Town Moor on 11/10/1819. Meeting was apparently an all-day affair related to the violent suppression of a similar meeting in Manchester on 16/8/1819. Extensive calls for "justice" and violent revolt. Written as a letter addressed to "William", the piece is fluent and amusing in style, but highly indignant in tone, and very much against the populist politics of the period.

APPENDIX FOUR

BIBLIOGRAPHY FORM

Author	Title	Publication, Vol. & Issue No.	Publisher	Date	Key Project themes

APPENDIX FIVE

NEWSPAPER CONTENTS FORM

Main Form

Project No	Leave
Brief Description	List of contents of Newcastle Evening Chronicle 1911
Author	
Source	Newcastle Evening Chronicle
Publisher, publication place and date	1911
Printer and printing place	Newcastle upon Tyne
Format	Newspaper
Images: engravings, sketches, maps, photos, postcards, film, video, etc	
Oral history recordings	
Location resource catalogue reference	
Volunteer	Searcher: Transcriber:
Date record created	Current date
Photocopy	
Digitise?	
	Continued below

Detailed Form for Itemised listing

Item Title	Author	Issue Date and No	Page & Col No	Any details inc. Keywords/themes
nb every other line is blank to take detailed summary and additional notes		nb this is filled in only after item has been read.		
e.g. Newcastle Guardians		1/7/11	p3.cc4	poor law

ORAL HISTORY TOOL KIT

Contents

Page:

1. Interviewing

1.1 In selecting interviewees for your project it's a good idea to check what already exists in local archives so that you don't duplicate what has already been done. It's not a good response to have somebody say 'i've already been interviewed about this'.

1.2 Interviewees will include those who **are linked by specific spheres of activity**. Others may be individuals found through personal contacts or from media coverage.

1.3 **The content of interviews will vary**, but even those with a narrow primary focus should also seek to place this in context by discussing matters such as childhood experience, education, occupation, leisure, and views of political and social questions.

1.4 All interviewers should undertake **a short course of training** in techniques, technologies and outcomes for the material collected. This should cover good interviewing technique, the recording equipment, and (in brief) the strengths and weaknesses of oral history. Training sessions in other areas of the field may be appropriate later within the project.

1.5 Generally speaking, interviewers are encouraged to **let lines of questioning develop naturally** from the interview itself, although they may wish to write down some ideas in advance. However, a selection of general, open and adaptable questions is below, along with web addresses for some sample questionnaires which may give you some ideas.

1.6 It is important to ensure that **basic information about the interviewee** is retained. It may be desirable to contact them in the future and essential to make sure that all interviews are correctly attributed. All interviewers should therefore fill in a biographical information form for each interviewee, and an interview information form for each interview (see below).

1.7 **Consent form and copyright issues.** The words spoken within sound recordings, and any transcription made from this, belong to speaker unless permission is granted for other uses, or copyright is assigned. Without this, only a very limited use can be made of a recording. It is important, therefore, that all interviewees be asked to sign the two forms below. The first gives permission for your organisation to make use of their material within your project's outputs, for instance on a web page or in a book or exhibition. The second is a broader assignation of copyright, jointly and severally, to your organisation and to whichever archival repository/ies are thought most suitable for that particular interview. This allows use to be made of the recordings by both bodies in the future, after your project is over, and allows the archive to make back-up copies as necessary. The interviewee retains the right to use their own memories (for instance to write an autobiography), and also the moral right to not use their words in a derogatory way. For more information, see http://www.ohs.org.uk/ethics/index.php

1.8 The aim is that **all recordings should be transcribed**, preferably by the person who has recorded the interview. A written set of guidelines is provided below, along with hints on software to make the task easier. However, this is a time consuming activity and it must be acknowledged that some people will not be able to transcribe all that they record. Equally however, some people may be more, or solely, interested in transcription work.

1.9 **All transcriptions, and audio files, should be held centrally by your organisation,** with a back-up system in place. If allowed by the interviewee, copies will also be donated to a suitable local repository.

1.10 **Oral history interview material can be used within a range of project outputs**, for instance on your website, in books or exhibitions. Interviewers are therefore encouraged to think about possible ways to present their material.

1.11 **Interviewees may hold archive material which would complement the recording.** Its existence could (with the consent of the interviewee) be noted for future reference.

1.12 It is good practice to give the interviewee **a copy of their recording.**

2. Surveying and cataloguing

1.1 There are many **oral history collections held in the region**, in archives, libraries, museums and elsewhere. Many of these are likely to contain some relevant material. These include Darlington Library, Gateshead Library, Beamish Museum, Living History North East, and the archives of Northumberland, Teesside and Tyne and Wear, although other smaller collections may also hold gems and are worth investigating.

1.2 Use the forms in the Archive Mapping and Research Pack for Volunteers to record the information.

1.3 Some existing recordings of activists may be the hands of private individuals in the form of **cassette or even reel to reel tapes**. Given the short life span of all audio carriers, it is important to encourage such individuals to get this material digitised. They may also choose to deposit a copy at a suitable institution.

INTERVIEWEE BIOGRAPHICAL INFORMATION

FULL NAME	
MAIDEN NAME	
ADDRESS	
TELEPHONE NUMBER	
EMAIL	
DATE OF BIRTH	
PLACE OF BIRTH	
BRIEF BIOGRAPHICAL INFORMATION	
INTERVIEW CODE NUMBER(S)	
COMPLETED BY	
DATE	

INTERVIEW INFORMATION FORM

INTERVIEW CODE NUMBER:	
DATE OF INTERVIEW:	
PLACE OF INTERVIEW:	
LENGTH OF INTERVIEW:	
RESTRICTIONS PLACED OF USE OF INTERVIEW:	
BRIEF DESCRIPTION OF AREAS COVERED:	
OTHER COMMENTS CONCERNING THE INTERVIEW:	
COMPLETED BY:	

CONSENT TO BE INTERVIEWED

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Statement of consent:
I agree to participate in this oral history interview and to the use of this interview

within the _____ project, as explained to me by the researcher.

My preference regarding the use of my name is as follows:

_____

I agree to be identified by name in any reference to the information contained
within this interview:
          *yes / no

Participant's signature:_____

Date: _____

Researcher's signature:_____

Date: _____

Copyright assignment and consent form

The purpose of this assignment of copyright is to enable _____
(your organisation) to continue to make use of your interview after the
_____ project is over. We also wish to ensure that a copy is kept
for future generations, and therefore wish to deposit your interview in
_____ *(Archives)* who may also wish to use material from your
interview in a variety of ways. These could include:

- use in educational establishments

- public reference purposes

- public performance

- use in publications including print and audio

- broadcast on radio or television

- publication through the internet

- any methods of access developed in future technology

As present owner of the copyright in the contributor content (ie, the words spoken
by the interviewee), I hereby assign such copyright to *(your organisation)*
_____ and *(assigned archive)* _____
I am aware that I retain my moral rights, and also the right to use the information I
have supplied for my own purposes.
Name:
_____

Interviewee signed: Date:
       Interview code:
_____   _____ _____

Researcher signed:

_____

Generic forms of question

Obviously what questions you ask will depend upon what you have been told, and what you want to know about. However, there are a few lines of approach which can be useful in dealing with many situations (usually if you already have the bare facts of what was going on, for which more narrow - but still open if possible - questions would be used). These include...
Can you tell me more about...
What memories do you have of...
Can you give me an example/illustration of... (can also be reworded to aim for a typical example or an extreme one)
What sort of a place/person etc was...
How did you feel about... Why?
Can you describe... to me?* What sounds/smells do you associate with...
What effect did that have on you? What effect did that have on your relationship with...
Why did you/whoever....
What was the worst thing about...
What was the best thing about...
How do you feel about... looking back on it now?
What did you learn from.../ how did... change you?
How typical was...
How did you become involved with...
What were your first impressions of...
How did... compare to your expectations?
What were the consequences of...

*one approach here if you are dealing with a particular space is to have them imagine they are walking into and around it, looking at each bit of it in turn.

Transcription Guidelines

Transcription is a time consuming business. It depends how fast the person speaks and how intelligible their accent is (and how fast you can type!) but you could reckon on 5-10 hours per hour of sound.

You are aiming to capture every spoken word, with the exception of false starts, hesitation sounds (for instance, "er...") and verbal tics (for instance, "you know", "like"), which should be included to a certain extent to capture a flavour of the person's speech, but do not need to be included with rigorous accuracy.

You will need a computer with either headphones or speakers. While you can play the sound file through several programmes on the computer, a very useful tool is Express Scribe, which you can download free and without strings from
http://www.nch.com.au/scribe/

If you open the sound file in this, it allows you (after pressing the F lock key on those keyboards which have one) to use the F keys – 4 to stop, 7 to rewind, 9 to play, are the ones you are likely to want – to avoid having to take your hands off the keyboard in the middle of typing. You can also slightly slow down the speech, though if you do this too far the distortion becomes a problem.

If there is a demand for it, training sessions could be arranged on various aspects of dealing with digital sound files, and editing sound.

It is important to be consistent with any symbols you use. There is no recognised standard for this, but for consistency, listed below are a set of conventions which you should follow within this project.

Transcription Conventions

1. Your editorial voice should be written in italics. This will include things like *inaudible section, unclear section, break for phone call*. Also use this when you are summarising content because it is repetition or very much off topic, eg. *Discusses modern morality. Talks about her children. Repeats information about the boiler*. Another use would be if you know are absolutely sure the speaker is factually incorrect, eg. *This was in 1951. She later corrected this name to Johnson.*

2. Distinguish between speakers - initials at the start of each speaker's part - JB: how did that feel?

3. Words or short phrases you can't make out at all – use <>. If you can hear the initial letter, at least, or are unsure of the spelling, use eg <B ?>, <Whitfield?> - EK: we went all over the villages, Sacriston, Stanley, <>.

4. Space things out enough for easy reading; use one and a half line spacing.

5. Place the number of the interview – which you will have been allocated from a central list – in the header of each page along with the name of the interviewee.

6. Use quotation marks for reported speech – SD: So I said to him "I have to go now".

7. Another important thing to do is note timings within the interview. Every time the interview comes to a natural pause, or every five minutes or so in any case, make a note of the time through the interview on the page. If you use Express Scribe (see below) this is made easier to see.

You may also find http://www.le.ac.uk/emoha/training/no15.pdf useful in its information about oral history transcriptions.

Some useful web addresses:
http://www.ohs.org.uk/advice/index.php and http://www.ohs.org.uk/ethics/index.php (the latter for more information on copyright and ethics)
http://www.le.ac.uk/emoha/training.html – straightforward fact sheets on different areas from the East Midlands Oral History Archive
http://historymatters.gmu.edu/mse/oral/ - "Making Sense of Oral History", an American course which mixes the practical and the theory, with some interesting exercises to get you thinking about different aspects.
http://www.history.ac.uk/makinghistory/resources/articles/oral_history.html – well-written set of pages on the different types of oral history, different theoretical perspectives and how it has changed over time, with links to many other interesting pages
http://www.lib.lsu.edu/special/williams/interview_qs.pdf – list of sample questions relating to all areas of life with an emphasis on customs.
http://www.ket.org/civilrights/questions.htm – list of sample questions relating to the American Civil Rights Movement.