

## Acquisition Policy

### 1 Purpose of Policy

- 1.1 This policy document provides guidance for staff and depositors regarding acquisitions by the Archives of the British Province of the Society of Jesus.
- 1.2 Its norms apply the orientations in the *Archives Mission Statement* and in the archive policies of the universal Society of Jesus.<sup>1</sup>
- 1.3 It sets out the procedures by which the Archives acquires material; it defines the scope of the collections; it specifies criteria for acquisition and appraisal.

### 2 Authority

- 2.1 It is ultimately the responsibility of the major superior governing the Jesuits in Britain to ensure that all records with archival value are collected and preserved. He delegates responsibility for the normal running of the Archives to the Archivist.
- 2.2 For any major decisions regarding acquisition and de-accessioning, the Archivist will consult the Archives Advisory Committee.
- 2.3 The Archivist, who will work in consultation with the Socius and the Archives Advisory Committee, may exercise discretionary judgment in interpreting the guidance in this document, and in responding to cases where it may seem inapplicable.

### 3. How Material is Acquired

- 3.1 Archive records, both analogue and digital, will normally be acquired internally from Jesuit sources, or by external donation (see Appendix 1 for a draft *Gift Agreement*).

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<sup>1</sup> See such documents as: *Manual for Juridical Practice of the Society of Jesus* (Rome, 1997), *Practica quaedam* (Rome, online), *Practical Instructions Regarding Archives* (AR XXIII, 2004); *Instructions on the Administration of Goods* (Rome, 2005).

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- 3.2 Material may be accepted on loan, after due reflection and for particular reasons. In such cases a formal deposit agreement must be drawn up setting out the terms and conditions of the loan, the length of time involved, and the obligations of both parties. Normally the Archives will agree to store the records appropriately; to carry out—within the constraints of its resources—any necessary cataloguing, conservation and reproduction work; and to make the records available to the public. In view of such commitment on the part of the Archives, the loan should normally last a minimum of 20 years. Alternatively, a charge may be made to cover the costs incurred.
- 3.3 The Archives may, exceptionally, purchase pertinent material being offered for sale, drawing on a contingency fund that has been set aside for this purpose, and provided for in the annual budget. Such purchases must be approved by the Socius and the Archives Advisory Committee.
- 3.4 Though the Archives serve primarily to preserve pre-existing material, the Archivist may occasionally generate material through such means as Oral History Recordings.
- 3.5 Within two weeks of receiving new material, the Archivist will complete an Accession Form, to be stored in the *Accession Register*. The Form will record:
- information on the nature and circumstances of each deposit;
  - any conditions agreed at the time of deposit;
  - the date and terms of transfer;
  - the name and address of the depositor;
  - a brief description of the records;
  - a note of any conservation work needed;
  - the records' temporary location pending cataloguing.
- When applicable, an acknowledgment of receipt will be sent to the depositor, and a disposal procedure will be agreed for material not ultimately incorporated into the Archives.
- 3.6 Records will be preserved and stored appropriately, in accord with the *Preservation & Conservation Policy*. Though a provisional assessment will be made at the time of acquisition, the final appraisal will normally take place during the cataloguing process.
- 3.7 Records will be retained only if they are of permanent historical or cultural value. The Archivist is ordinarily responsible for the necessary judgments, with the support of external advice as appropriate. Rejected material will be treated according to the de-accessioning procedure (see section 6 below).
- 3.7 The Archives will aim to catalogue records and to make them accessible for public access in a timely fashion.

#### 4 Criteria for Accession

4.1 The core collection of the Archives consists of the following:

- Official and non-official records reflecting the management and government of the Province, and important events in its history. (See Appendix 2, which reflects the policies of the universal Society.)
- Personal papers of deceased members of the Province. (See Appendix 3, which provides guidelines for superiors and others responsible for sorting through the effects of a Jesuit following his death).
- Records displaying the historical significance of the British Jesuits.
- Records relating to communities and ministries of the Jesuits in Britain, past or present.

4.2 If such material has been deposited in the archives of local communities, British Jesuit Archives will seek to acquire catalogue information for incorporation on a central database, and may seek copies for ease of reference.

4.3 The Archives actively collects publications by British Jesuits, as well as works of research, published and unpublished, relevant to the life and history of the Province. These will normally be kept in the library attached to the Archives.

4.4 The Archives seeks to collect inventory lists and photographic records of any items of significant heritage value belonging to the Province. It is envisaged that the information will be assembled in a Province heritage database. The Archives may, on occasion, also be responsible for storing and conserving such artefacts. These are to be kept separately from the paper and digital records that make up the core collection.

4.5 For certain kinds of material, particular considerations apply:

- *Records relating to parishes.* If the parish church is owned by the Jesuits, the Archives take responsibility for them. Otherwise records are the property and responsibility of the owners. Where the ownership of a church is altered, responsibility for archive material may need to be determined.
- *Parish Registers.* These normally remain in the parish concerned.
- *Confidential or especially sensitive records.* These will be retained by the Curia rather than the Archives.<sup>2</sup>
- *Material relating to other Jesuit provinces or their members.* Unless there is a significant connection with the British Province, this will normally be sent to the Province concerned.

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<sup>2</sup> *Manual for Juridical Practice of the Society of Jesus* (Rome, 1997), n.270 §2; *Practical Instructions Regarding Archives, AR XXIII* (Rome, 2004) §3.

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- *Reproductions.* These will be acquired only if the original document is unknown, or no longer extant.
- *Duplicate records.* These will be retained only for special reasons and in moderate quantity.

4.6 The following types of material will not normally be retained in the Archives, and will be treated according to section 6 below:

- Material lacking permanent historical or cultural value.
- Records damaged beyond repair or recovery.
- Records requiring a treatment beyond the Archives' normal resources.
- Frames, trunks, chests and other containers.

4.7 Other things being equal, the Archives will respect the integrity of donated collections, and may, at the Archivist's discretion, modify the provisions of 4.5 and 4.6 in their regard.

## 5 Terms and conditions

5.1 Once material has been accessioned, the Archives takes responsibility for its preservation, conservation and use.

5.2 It is assumed that the depositor has the right to dispose of the material in question. When the circumstances warrant, the Archivist may ask for documentary proof.

5.3 Records referring to living or recently deceased individuals should be handled in accordance with the Data Protection Act 1998 and the norms of the Society of Jesus.

5.4 Though the Archives in principle seeks to make records available for legitimate research as generously as possible, limitations on access required by law, or specified for good reason by the depositor, will be respected.

## 6 De-accessioning Procedure

6.1 Material deemed unsuitable for acquisition or retention under the provisions of section 4 will be disposed of. It may be returned to the depositor, destroyed, sold on, or transferred to another collection.

6.2 The following considerations, among others, will apply:

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- the wishes of the depositor as recorded in the Accession Form (see 3.5 above) or otherwise known.
- the relevance of the records for collection in another repository.
- the market value of the records.
- the provisions of the Data Protection Act 1998 regarding living identifiable individuals.

This policy will be reviewed at five yearly intervals.

Created by Rebecca Somerset, September 2016

Redrafted by Philip Endean, February 2017

Approved by the Archives Advisory Committee, February 2017

Review due in 2022



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**Agreement for the gift of records**

This gift agreement is made between the British Jesuit Archives and the donor as specified below:

**Schedule 1: Donor Details (Please see Terms and Conditions – Item 1.1.2)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

Tel. Number: \_\_\_\_\_  
Email: \_\_\_\_\_

This gift agreement relates to the items described or identified below:

**Schedule 2: Donated Items**

This gift agreement shall be subject to the terms and conditions set out overleaf.

I hereby donate the scheduled items under the conditions set out above:

Signed:

Date:

I confirm acceptance on behalf of the British Jesuit Archives:

Signed:

Date:

## **Gift Agreement: Terms and Conditions**

### **1. Definitions and General**

#### 1.1 In these terms of agreement

1.1.1 the **Archives** means the British Jesuit Archives,

1.1.2 **donor** means the person who gives the records to the Archives according to the terms specified in 1.1.4 below. By signing this agreement, the donor warrants that they have powers to act in all matters relating to the donated records,

1.1.3 **Archivist** means the Archivist in charge of the Archives services of the Jesuits in Britain, and

1.1.4 **Gift** means the donor has transferred the items referred to in schedule 2 to the ownership of the Archives absolutely and in perpetuity. The donated items will become the sole property of the Archives, which may take whatever action it thinks fit in respect of such items, subject only to the outlined terms and conditions, the general law and any special conditions agreed in writing. Items cannot be withdrawn once gifted.

1.2 The donor confirms that he/she is the legal owner of the donated items and undertakes to provide proof of ownership if requested by the Archives.

1.3 The Archivist reserves the right to return to the donor (if such persons can be traced following reasonable enquiry) any donated items deemed to be of no historical interest, or to transfer them to a more appropriate place of deposit, or destroy them confidentially.

1.4 Any change in the name and address of the donor shall be notified to the Archivist. The Archives will not accept responsibility for any consequences which may arise from the failure to notify them of such changes.

1.5 For legal purposes, donor details will be maintained permanently in electronic and manual formats. While the name of the donor may be included in finding aids to provide a greater understanding of the provenance of the collection, full contact details for the donor will not be released without the express permission of the individual concerned.

### **2. Preservation**

2.1 The Archives will take all reasonable precautions to preserve the donated items from damage, loss or theft whilst in storage, public use, conservation or on exhibition, and will manage them, subject to conditions not less favourable than those considered acceptable for those records created by the Jesuits in Britain. Such conditions are, however, at the absolute discretion of the Archives, and the Archives shall not be liable to the donor, or any person claiming through them, for any loss or damage to the items howsoever arising.

### **3. Conservation**

3.1 The Archives may at its absolute discretion:

3.1.1 Photograph, microfilm or otherwise copy or reproduce the donated items as a conservation measure – subject to the provision of the Copyright acts for the time being in force. The ownership of all such copies, negative and positive, will be vested in the Archives.

## Acquisition Policy Appendix 1

- 3.1.2 Carry out such work in regard to the conservation of the donated items as may from time to time be considered desirable and practical by the Archivist.
- 3.1.3 Withhold or limit access to any of the donated items in a fragile condition until such time as all practical and necessary measures to conserve them have been carried out.
- 3.1.4 Number the items for security, identification and retrieval purposes.

### **4. Listing**

- 4.1 The donated items will be listed in accordance with the Archives' current cataloguing practice. As there is a significant backlog of records waiting to be listed however, it must be understood that it may not be possible to list records immediately. The copyright in all such lists and other finding aids will be vested in the Archives, as is the right to publish such finding aids on the web, or by any other means deemed appropriate.
- 4.2 Catalogues or calendars of donated items shall be made available to the public and others under such terms as the Archives may determine.

### **5. Access**

- 5.1. All donated items may – subject to the exceptions outlined in 5.2 below, or as required by law - be examined, inspected, exhibited or loaned, or used in any way at the absolute discretion of the Archivist. (The Archivist reserves the right to refuse access to records which have not been catalogued or numbered, or which are in a fragile state, or in need of repair).
- 5.2. By agreement with the donor and the Archivist restrictions may be placed on public access to the donated items for a specific period of years either because of the particular sensitivity of their contents or to comply with legal requirements such as the Data Protection Act.

### **6. Publication and Copyright**

- 6.1. Having regard to the provision of the Copyright Acts currently in force, copies of records may, at the discretion of the Archivist, be supplied to any person or body, for use in non-commercial private study, research or examination. The Archives will not be liable for any breaches of copyright of records in its custody, except insofar as such breaches relate to the acts of its designated officers.
- 6.2 The Archivist cannot grant consent for publication on behalf of the copyright owner, unless copyright is held by the Jesuits (British Province). Responsibility to obtain copyright clearance for publication rests with the applicant. The Archives will not be liable for any breaches of copyright of records in its custody, except insofar as such breaches relate to the acts of its designated officers.



### **List of documents to be retained in Province Archives**

This list combines the lists set out in *Practica quaedam* (Rome), 1.6.3 and *Practical Instructions Regarding Archives AR XXIII* (Rome, 2004), §15-40.

1. Documents mainly relating to governance:
  - a. Documents of the Holy See and Father General
  - b. Documents of the Assistancy and Conference of Provincials
  - c. Documents of the Provincial
  - d. Documents of Ecclesiastical Authorities
  - e. Documents of Civil Authorities
  - f. Acts of the Provincial Congregations and other documents related to them
  - g. Acts of the Province Consultations
  - h. Acts of Meetings of Province Commissions
  - i. Copies of the Statistics and Catalogues
  - j. Triennial Catalogues of those apt for governance
  - k. *Informationes*
  - l. Various books or registers
  - m. Catalogue of the benefactors of the Province
  
2. Documents mainly about temporal administration
  - a. Economic documents
  - b. Juridical documents
  
3. Documents related to history
  - a. Documents of the province, houses and apostolic works
  - b. Publications of members of the province
  - c. Summaries of the lives of the deceased members of the province
  - d. Writings and significant objects left by deceased members of the province
  - e. Other documents or similar objects of interest for the history of the province
  - f. Correspondence with non-Jesuits
  - g. Plans, maps, photographs

### Guidelines for selecting materials of deceased Jesuits for the archives

The personal effects of a deceased Jesuit remain the property of the British Province of the Society of Jesus, as indicated within the practical guidelines of the Law of the Society of Jesus [*Manual for Juridical Practice of the Society of Jesus (1997)*, Paragraph 212].

When a member of the British Province of the Society of Jesus dies, his personal material should be sorted by the Superior or designated person appointed to carry out this task.

"Personal material" may include not only papers, but also material stored in various electronic forms. It is therefore important to remember to check computer hard drives, external hard drives and memory sticks, and cloud storage.

A list of the personal material of potential interest to the archives is given on the next page. The archivist can provide assistance remotely or in person in the appraisal of material to be preserved at the British Jesuit Archives.

If there is any doubt about material, seek advice from the archivist or simply send everything considered remotely of interest to the archives, as further appraisal will be done by the Archivist once the material has been transferred and any non-archival material can be identified at that stage. Be aware that individuals may have papers or writings held for them by agents or third parties. Do not be pressured into conceding rights to the use or disposal of such items. In any doubt, refer the matter at once to the Provincial's office.

When the deceased Jesuit has surviving family members it may be that family photographs and family papers are offered to them, but this and any other offer of access to material of a deceased Jesuit should only be done **after** the initial appraisal and selection of material for the archives is completed and it must be ensured that this selection is transferred to the archives intact.

Once the personal material has been sorted and the personal papers for preservation in the archives identified these should be packaged ready for transfer to the archives. The preferred method of transferring the material to the archives is with a member of the community or staff, and not in the post. It may be possible for the archivist to collect in person.

As set out in the *Archives Access Policy*, the personal papers of a deceased member of the Society of Jesus will in principle be unavailable for research or other purposes until forty years after his death.

If you have any queries or for any advice about this please contact the archivist, Rebecca Somerset, at [archives@gbsj.org](mailto:archives@gbsj.org) or on 020 7529 4836.

Personal material of interest to the archives includes (but is not restricted to):

- Curriculum Vitae, sacramental records, birth and death certificates
- Honours, awards and trophies (if an institution promises to keep them, a list of these is sufficient)
- Family background and genealogical records
- Photographs and photo albums showing ordination, groups, individual (ideally with captions), but not wanted are purely scenic, animal or other generic photographs.
- Writings (published or unpublished) by the individual
  - o Manuscripts, articles, etc
  - o Correspondence (though not pro forma letters or cards [unless of real significance eg 100 Birthday card from Queen])
    - To/from Superiors
    - Among members of the Province
    - To/from ecclesiastical superiors
    - To/from civil authorities
    - Personal or family letters
    - Financial papers, bank statements etc
  - o Sermons and retreat notes
  - o Spiritual notes and journals
  - o Lecture/talk notes
- A list of the titles of the books, cassette tapes, CDs, DVDs etc in his room should be made before the collection is distributed. Books with extensive annotations by the individual SJ should be transferred to the archives. Also, prior to disposing of books by British Jesuits please check whether the archives already has a copy as it is trying to ensure completeness. Older pre Vatican II mass books can also be useful for researchers.
- Artwork by individual
- Artefacts of significance

Although it is unlikely these will be found among the personal papers, the archives would also be interested in:

- Obituaries and tributes
- Requiem order of service, prayer card and a copy of the homily

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## Formulae for prospective donors

### 1. Appeals

British Jesuit Archives is always keen to receive material of significance for its purposes. If you think you may have such material, and are interested in depositing it in the collection, the Archivist would be delighted to discuss the matter with you.

The contact details are as follows:

Archives  
114 Mount Street  
London  
W1K 3AH

Telephone: 020 7529 4836

Email: [archives@gbsj.org](mailto:archives@gbsj.org)

### 2. Response to First Enquiry

Dear ...

Thank you for contacting us in connection with ... and the possibility that you might deposit it in the British Jesuit Archives

(a paragraph responding to the particular case)

I enclose a copy of our Acquisitions Policy, which sets out how we deal with proposals of the kind you have made.. It is inevitably a rather long document, and some of it is quite technical. The most important points for the moment are probably the following:

- We collect only those records of historical and cultural significance relevant to the Jesuits in Britain.
- Records deposited in the Archives should be in reasonably good condition
- We will discuss with you prior to the arrival of any records an appropriate procedure for dealing with anything not suitable for final retention in the Archives.

If you have any kind of list of contents for the records, however informal, we would be very grateful to receive a copy in order to facilitate the process of assessment and cataloguing.

(appropriate ending)