

Prepare the session

Purpose

Prepare a small authorized capture batch that can be checked, found, backed up and handed over.

What to bring

Guide and eight-page forms pack r2; a stable modern practice booklet of at least four pages; one loose practice insert; camera and secure stand; suitable lighting and support; computer; approved practice storage. Use no historic or restricted originals in training.

People and preparation

Facilitator, photographer, sequence logger/checker, authorized custodian and deputy. The records owner and responsible authority determine scope, handling and access. Obtain specialist help for material that volunteers cannot handle safely.

Choose the right setting

This is a 75-minute practice workshop. It teaches a small copying workflow, not conservation treatment or public release. Use a modern expendable booklet marked PRACTICE. A condition concern means stop and document it, not try harder to flatten the page.

How to use this companion

Read SAY passages aloud or adapt them in your own voice. DO passages are facilitator instructions. Replace bracketed names and dates before use. Every scenario identified as fictional is practice material, not evidence about your lodge. The meeting on page 4 is a separate session, not extra time inside the workshop.

Keep the set together

Guide revision 2 is the matching source. Existing guide and forms remain the authority for the workflow. This companion adds practice and meeting structure; it does not replace permission records, privacy procedures or governing approvals.

Workshop script | opening

0-8 minutes | Establish authority and stopping rules

SAY: “Custody is not necessarily ownership. Before real records move, we identify their creator and owner, the approving authority, applicable restrictions and their original location. Permission to copy does not permit publication.”

DO: Use the setup checklist. Name stop conditions: wet material, suspected mold, pests, crumbling paper, stuck sheets or a binding that will not open safely. Do not diagnose or treat these in the workshop.

8-18 minutes | Survey without rearranging

SAY: “One survey line describes one box, volume or folder in its existing order. UNKNOWN is an honest date. Priority means urgency for assessment; it does not authorize handling.”

DO: Complete a fictional shelf-survey line for the practice booklet. Record its creator, location and condition. Photograph the arrangement before moving anything. Keep the insert associated with its original place.

18-30 minutes | Make and inspect five test images

SAY: “We want readable evidence across the whole page. Native resolution, even light, full edges and a supported opening matter more than a device’s marketing label.”

DO: Test the secured stand over an empty table. Capture the first five safe views of the practice booklet, including cover and blanks as applicable. Check center, corners and gutter at full size on a computer. Retake blur, glare or clipping; never force a book flat.

Workshop script | practice and close

30-45 minutes | Capture and log the sequence

SAY: “Image number and printed page number are different. We keep covers, blanks, backs and safe-to-open inserts in order. A missing view needs an explanation.”

DO: Photograph a short agreed scope. Use the page-sequence log, linking the insert, both sides where safe, and any detail shots or retakes. Retain native originals and metadata. Keep original-to-renamed mapping; do not overwrite a source to hide a mistake.

45-57 minutes | Verify and make copies

SAY: “Spot checks during capture help us catch faults early. Completion requires checking every image in the planned batch and reconciling the sequence. Three independent copies, at least one off site, protect the work.”

DO: Compare the short practice batch against the booklet. Open each image; check counts and transfer integrity, with checksums where available. Restore a practice file from a backup and open it. If a copy or restore is unfinished, record the batch as incomplete.

57-68 minutes | Catalog and decide access separately

SAY: “The catalog finds the record and carries its restrictions. U means unreviewed and no distribution. A complete preservation batch is not an approved public release.”

DO: Complete a catalog entry and link the completion record. Demonstrate the Access and release decision for a fictional request; specify exact files, audience, use, authority and limits. A review date does not automatically open access. Keep the master catalog restricted.

68-75 minutes | Choose a manageable pilot

SAY: “What stable, authorized item can we finish with the people and storage we have? We will measure the pilot before promising an entire archive.”

DO: Assign the scope, custodian, deputy, first-five check, final image-by-image review, three-copy verification and report date. Return originals to their recorded locations. Document unresolved gaps and the authority needed for any later movement or deposit.

Sample 35-minute records-preservation meeting

Before the meeting

This meeting approves a scoped pilot through the applicable authority. Circulate an aggregate inventory and plan; keep restricted record details and the master catalog within authorized access.

0-5 minutes | State the loss risk and proposed scope

Describe one stable manageable batch, its creator, owner and current location.

5-12 minutes | Review authority, condition and restrictions

Identify approvals and stop conditions. Defer unsafe handling for specialist advice.

12-20 minutes | Agree the capture and checking plan

Name willing photographer and checker; use survey, sequence log, test images and full final review.

20-27 minutes | Confirm storage, custody and capacity

Three independent copies, one off site, authorized users, restore check, deputy, time and spending limits.

27-32 minutes | Set completion and access expectations

Use Batch completion and verification. Any sharing needs its own exact-version access decision.

32-35 minutes | Read back the pilot and review date

Record authority, approved scope, owners, limits, unresolved tasks and reporting date.

Closing words

SAY: "We propose copying [defined batch] under [authority], with [willing people], within [limits]. Completion means capture, full checking, cataloging and verified copies. Sharing is a separate decision. We will report exceptions as well as successes on [date]."

After the meeting

File the survey, sequence log, catalog, completion record and relevant permissions together. Report counts, gaps, time and storage measured. Test recovery and record succession arrangements before expanding the project. Photography never authorizes disposal of originals.