Access and Use Policies
Digital Stewardship Curriculum

- Providing access to collections is central to the mission of many Tribal archives, cultural centers, and other collections institutions or departments.

Access and Use Policy Components

- Guidelines for who can see and use materials
- Guidelines for how they can be handled and used
- How they can be reused and circulated in digital environments

- In these slides, we recommend certain sections an access and use policy should contain -
  - depending on your mission and goals your policy sections might look different or be more robust
- In the age of internet access and remote research across distance, your access and use policy should cover **both** physical **and** digital materials (equally spelled out)
- Components of an access and use policy are:
  - Who, what type of audience, how you want to group your users - what people should have access to
  - How - when you know who you are serving, then how should people be interacting with materials - will it be different for elders to use a sacred item than others?
  - May already have access and use for physical - but need digital too, the medium makes the policies different from object to object (ex someone coming in and listening to a tape in your museum, asking for a copy vs. someone being able to download the track). Think about digital environments you have available now and in the future, and the opportunities and risks associated with them.
- The points above help you get to the idea of "Levels of Access"
  - Determine if it is best for access to be one way, across the board
  - Or if it is best to have a nuanced approach with multiple options depending on the material and the person/group of people - what are your "levels of access"?

Access and Use Onsite

- Reading room policies
  - Explain levels of access
  - Scanning, copying, or photographing
  - Any charges or fees for services (research, use of equipment, taking images)
  - Reference services, and limitations
  - Researcher forms

- There are definitely some specific things that apply to the onsite archive/museum/library
- Want the guidelines to be very clear for everyone
- Want to make the best use of staff time
  - What services do staff provide?
  - What don't they provide? Are there any important boundaries or limitations to explain to users?
- Can make sure that costs of equipment or staff time are compensated through charging fees for services and equipment use
  - Some archives charge only when research will be used for commercial use
- Researcher forms
  - Making sure that you have a relationship and knowledge of any researcher that comes in (inside or outside the community)
  - Get necessary contact information
  - Make sure users read and understand all rules and agree to them
  - For researchers outside your community, you may want to consider a separate Internal Review Board research application process for approval of research

- Consider types of digital access that you can and should provide currently and in the future. Examples:
  - Computer workstation
  - Flash drive, cd, email, cloud service
  - Web platform - like mukurtu, or another like pastperfect, contentdm, etc
- Create guidelines for digital access and use - how are they similar to onsite access and use, and how are they different?
- You may have certain services available virtually/online

Rights, Intellectual Property Statement

- Explaining appropriate use
- Defining researcher's responsibilities
  - Appropriate attribution
  - Contacting the copyright holder
- Procedures to get approval from your Tribe for research
  - Research Application

- Likely a separate policy is needed for this important topic - may be department specific, or institution or Tribe-wide
- If you don't have an Intellectual Property Policy yet - here are some topics you will probably want to cover
  - Explain appropriate use and the researchers rights and responsibilities
  - Explain what copyright is, and other intellectual property, legal concepts, and community and cultural considerations
  - Traditional Knowledge Labels and Creative Commons Licenses might be other tools you can use and educate about
- Again, what kind of research application or request is needed? Who should review and approve?

Access and Use Policy Examples

- Search online
- Ask colleagues in similar departments or institutions for assistance
- Examine sections, purposes, and structures
- Adapt what you learn to your situation

- We strongly recommend finding examples to help you as you draft your own policies
- Common elements found in examples
    - Groups of users outlined
    - Digitization procedures
    - Physical access procedures

Access and Use Policy Drafts

- Start with the SHN resource *Developing an Access and Use Policy Worksheet*
- Start with bullet point notes
- Then move to drafting paragraphs
- Each policy will be different, depending on your priorities and community goals
- Approvals - follow your own protocols and timelines

- The SHN worksheet *Developing an Access and Use Policy Worksheet* asks a series of questions that when answered will form a foundation for a access and use policy draft.Try to give yourself at least a few days with this worksheet. If you can, work with others to brainstorm.
- You can work with your organization's typical protocols and timelines for getting new policies approved.
- If you already have a Access and Use policy, or parts of sections, you can use the worksheet to see what areas you might want to expand or change based on this training. After you have added to the worksheet, you can use it as a beginning to draft full paragraphs.

Credits

Using this Resource

The Digital Stewardship Curriculum is an Open Educational Resource created by the Center for Digital Scholarship and Curation.