

PHA WA



**A practical guide to engaging  
consultant historians**

# **COMMISSIONING HISTORY**

**Occasional Publication No. 3 (2011)**

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**A practical guide to  
engaging consultant historians**

**Occasional Publication No. 3 (2011)**

**prepared by  
Professional Historians Association (WA) Inc.**

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## COMMISSIONED HISTORIES

A history is a way of sharing the story of your group, government department, school, church, union, organisation, family or area with the wider community. Commissioned histories vary in type according to the subject matter, the desired outcome of the commissioning body and the author's approach and skills. Social issues are dominant in some histories whilst economic, environmental, technological and political issues are the focus of others. Others still may mark a special event or anniversary. The sources used to write each type of history varies, but in all cases the author locates, critically analyses, and interprets appropriate research materials.

The work produced by people who write commissioned history varies greatly in content and quality. Commissioning bodies are therefore well advised to approach the task of developing a history project with great care.

Professionally qualified historians bring a broad historical knowledge, strong research skills, an independent outlook and effective writing skills to a history project. Trained historians have the skills and experience to identify, collect and interpret research materials, conduct oral history interviews, research pictorial collections and other media, and produce an engaging and lively outcome which locates your story in a wider historical context. They can also assist with overseeing the completion of the project to an attractive end product.

Those commissioning a history often think first of a book, but professional historians do more than write books. A small booklet, a collection of oral histories, an exhibition, a radio program, a CD-ROM, a website, or even a digital storytelling portal or archive might best suit your organisation. You will be able to find a professional historian with the necessary skills and experience to meet the requirements of your particular project, and who will be aware of the appropriate presentation technique for the audience you are trying to reach.

Contact with professionally qualified historians can be arranged through the [Professional Historians Association \(WA\) Inc](#) and some universities.

PHA (WA) is a member of the [Australian Council of Professional Historians Associations](#) (ACPHA), which established the criteria by which PHA (WA) and other member associations accredit historians. ACPHA advocates the engagement of people whose qualifications and experience meet the accreditation criteria.

Commissioning bodies that wish to engage an independent historian are urged to read the following guidelines before scoping and advertising their projects. While these guidelines are focused towards the researching and writing of a manuscript for a book, they apply equally to any form of commissioned history work.

## **DEFINING THE WORK**

The commissioning body may wish to have the historian both design and undertake the project. If so, it should expect to pay for the historian's services from the time of first contact. If the body is to design the project itself, payment for services will commence with the signing of a contract.

In the latter case, the commissioning body should have a clear idea of its objectives before advertising or initiating discussions with historians. The product could be defined by:

- the scope of the history/project;
- the length and comprehensiveness of the manuscript;
- the approximate number of illustrations;
- the coverage of events;
- the style of writing; and,
- the standard of presentation, particularly with regard to citing the sources of information.

Similarly, projects with a different type of outcome such as a website or an exhibition should take into consideration:

- the scope of the history/project;
- the coverage of events and identification of stories/themes;
- the development of content;
- the selection of appropriate illustrations and associated copyright issues;
- the style of writing/interpretation; and,
- the standard of presentation, particularly if the project will include design and construction.

It is essential for the commissioning body to decide at the outset whether it will allow the historian autonomy in presenting his/her findings or, alternately, whether it wants to present a prescribed viewpoint or argument. The credibility of the work will depend heavily on the historian's autonomy, and he/she must know if the commissioning body wishes either to withhold specific records or to shape the presentation. PHA (WA) urges commissioning bodies to accept historians' professional judgement and advice, and to refrain from influencing the presentation of research findings.

In defining the work, the commissioning body should identify both the potential audience and the image it wishes to convey with the final product. Both present and future audiences should be taken into account, as should the value of the final product as an educational resource. The latter is likely to be determined in part by the standards adopted for citation of sources and, in this area, the Association recommends use of the [\*Style Manual for Authors, Editors and Printers\*](#) published by the Australian Government Publishing Service.

The commissioning body will also need to assess both the historical period to be covered by the work and the significant happenings of that period. Input may be needed from the historian for these aspects. It may be necessary to defer the precise definition of what the work will cover until the historian has completed a nominated

amount of preliminary research. PHA (WA) advises that the commissioning body respect the historian's opinion in this area.

Discussions with historians who are interested in undertaking the project may reveal shortcomings in the commissioning body's initial concept. It should be noted that historians cannot confidently quote on, or accept a contract for, a project without a clear idea of the desired outcome.

The commissioning body could consider examining works comparable to the one it wishes to have produced, thus providing the historian with an example of work that will meet its requirements. This approach should ensure the historian is aware of the commissioning body's objectives from the outset - thereby minimising potential for misunderstandings. Should a dispute arise, the two parties will have an agreed benchmark against which to assess the historian's work.

It is highly recommended that the commissioning body prepare a scope/brief that clearly defines the project. The commissioning body must also carefully consider how the production of the history is going to be funded. These guidelines comment further on such matters below.

## **THE MANUSCRIPT**

It is recommended that the parameters of the project should be discussed in consultation with an historian or someone with appropriate experience. At the very least, the commissioning body is advised to give consideration to the following points when defining the project:



- the subject matter to be covered in the manuscript;
- what sources the commissioning body has and how they will be made available to the historian. It may be desirable to have a professional archivist organise archival material prior to the commencement of the project. Other sources include contacts with past members and other sources of information;
- the anticipated length (pages/words) of the manuscript;
- the anticipated proportion (or number) of illustrations, e.g. photographs, sketches and/or maps;
- whether the historian is required to indemnify the commissioning body against actions arising out of the research for, or publication of, the manuscript;
- who is to be responsible for obtaining permission to use material required for illustrations and quotations;
- who is to be responsible for costs involved in obtaining negatives or high resolution scans, and for any fees required by owners;
- who is responsible for selecting and writing the captions for photographs, illustrations and/or maps;
- who is to be responsible for returning photographs and materials loaned to the historian or the commissioning body for use in the project;
- the level of assistance the commissioning body can provide, e.g. office space and facilities, vehicle or travel expenses, accommodation;
- the format and number of hard copies of the manuscript to be delivered to the commissioning body by the historian;
- when, where and by whom the manuscript will be published;
- who is to be responsible for taking the manuscript through the editorial and publication process;
- who is to be responsible for proof-reading;
- who is to be responsible for preparing the index;
- the format of any electronic copy required for publication;

- whether the historian is entitled to an author's rights to royalty on first and subsequent editions of the book;
- who will hold the copyright; and,
- how much the commissioning body is prepared to pay for the preparation and publication of the manuscript.

These points can also be used when considering the development of other forms of commissioned history products and as outlined in the [‘How to plan a project’](#) section of [the PHA \(Vic\) website](#).

## **PROJECT TIME AND COSTS**

### **Research and Writing**

The nature and complexity of the work will determine its cost.

As a general guide, researching and writing the manuscript for a comprehensive history of either a region or a large, long-standing organisation involves at least two years' full-time work for one historian. This estimate does not include the time required for writing extra material for such publications as in-house journals or local newspapers whilst the project is in progress.

The [‘Employing an Historian’](#) section of [the PHA \(Vic\) website](#) provides further information about financial aspects under the heading [‘Costing a project’](#). This guide can also be applied in relation to different commissioned history products.

The historian's principal task will finish with the handing over of the manuscript, but his/her continued involvement is desirable to ensure that errors do not occur during the publication process. Tasks at this stage include editing, proof-reading, indexing the type-set pages and binding. Most historians see this work as an essential part of their responsibilities.

Complex projects, such as those involving oral histories, may require one or more appropriate professionals or research assistants whose services can usually be obtained on an hourly basis subject to prior agreement between the historian and the commissioning body. It is usual for such people to directly invoice the commissioning body.

### **Publication**

The publication process (commencing from the time the commissioning body receives the completed manuscript/work from the historian) can sometimes take from three to six months or sometimes longer. It is important not to underestimate the time needed, or the possibility that the publishing or production process may be delayed by unforeseen events.

When it comes to the more traditional book form, it is usually only the smaller, specialty publishers that are interested in handling histories of regions or organisations. Printing companies are a good alternative for publishing such work and there is also growing interest in producing histories in digital forms.

Decisions about the publishing or production process need to be made during the planning stage so that the committee and the historian know whether the design work will be done by the printer or by an independent designer.

## **Funding**

There are only a few number of grants programs which award funding for the researching, writing and producing of a history. The Lotterywest [Commissioning Histories program](#) is one of these, but is highly competitive.

PHA (WA) advises the commissioning body to ensure their project is properly costed as per the above, and that this forms part of their budget and/or financial planning. Indeed, it is possible for a commissioned history to be staged in such a way that milestones can be reached over several financial years, thus allowing a well researched, presentable and appealing product to be successfully achieved.

## **HISTORIAN'S CREDENTIALS AND FEES**

The skills and experience of people eligible for accreditation by PHA (WA) differ according to the fields in which they have worked. The fees they require will depend on their qualifications, expertise and previous publications. ACPHA has devised a [National Standard for the accreditation of professional historians in Australia](#), a [National Standard for the accreditation of historical researchers in Australia](#), and a [Scale of Fees recommended for the engagement of accredited professional historians in Australia](#) (exclusive of disbursements). These documents are also available through either PHA (WA) or [the ACPHA website](#).

Disbursements cover such items as office space and facilities, travel, accommodation, word-processing, photocopying, scanning, reproduction and copyright costs for illustrations, printing of drafts that are not submitted electronically, postage, and general stationery needs. Provision of materials by the commissioning body may reduce, or cancel the need for, disbursements.

## HOW TO FIND A PROFESSIONAL HISTORIAN

PHA (WA) issues [a directory of consultant historians and researchers](#) available for work and you may decide to invite expressions of interest or proposals from among those listed.

However, as few qualified historians are available to start work on a major project immediately, the commissioning body is likely to attract a better range of respondents by advertising its intentions well in advance of the desired starting date for the project.

Advertisement in the Employment or Arts sections of major newspapers may be more effective than a notice in the Tenders section. Free advertisements are carried in the PHA (WA) newsletter or emailed directly to all Members.

PHA (WA) recognises that some organisations routinely put work out by tender but urges commissioning bodies to consider the advantages of seeking skilled people at a pre-determined salary level. Using eligibility for PHA (WA) accreditation as a selection criterion will alert people to the standards required by the commissioning body, and possibly streamline the subsequent selection process.

The advertisement should state that a brief is available, and this document should set out all the requirements of the commissioning body. The [‘Employing an Historian’](#) section of [the PHA \(Vic\) website](#) provides information about briefs under the heading [‘How to plan a project’](#). The advertisement could also state that short-listed respondents will be asked to submit examples of previous work. This approach will allow the commissioning body to evaluate each respondent's ability to carry out the work satisfactorily, particularly if he or she has not done comparable work previously.

## THE CONTRACT

Following the selection of the historian, a contract or a letter of agreement should be drawn up to the satisfaction of both parties. This document should set down the responsibilities of both parties and provide for resolution of any problems that may arise during the project, possibly through the appointment of an independent expert as an arbitrator. The '[Business Resources](#)' section of [the ACPHA website](#) provides information about contracts and an example of a short contract. Modification of contractual arrangements is frequently required in commissioned work so contracts should allow for the addition of variation clauses.

The manner in which the commissioning body will pay the historian should be stipulated in the contract. Negotiations by individuals will vary, but it is not unusual for historians to receive a starter fee, progress payments, and a final payment upon submission of the completed manuscript. Alternative arrangements may allow for payment on a basis comparable to a salary.

## MANAGEMENT OF THE PROJECT

PHA (WA) recommends regular consultation between the commissioning body and the historian. It benefits both the commissioning body and the historian if one person from the commissioning body is appointed to manage the project and act as the main point of liaison.

Setting out a mutually agreed timetable for completion of the project, with scope for modification, is desirable. The periodical submission of completed chapters or sections of work, and progress reports will allow the commissioning body to ensure the project is progressing in accordance with its objectives. Regular feedback to the historian will assist him/her to meet the commissioning body's requirements.

Where little professional or authoritative historical research has previously been done, the parties may have difficulty deciding:

- a logical structure for the manuscript/project; and,
- a reasonable period of time for completion to the commissioning body's requirements.

The commissioning body might therefore require the historian to submit an outline of his/her planned approach in:

- a tentative form only at the time of engagement; and/or,
- a concrete form after a period of initial research.

## **COPYRIGHT/OWNERSHIP OF ASSOCIATED RESEARCH MATERIAL**

PHA (WA) recommends that ownership of the copyright of the final manuscript/project, ownership of the associated working papers and research materials, and right of future use is pre-determined and spelt out in the contract.

While it is desirable for copyright to remain with the historian, it may be necessary to set down conditions under which the commissioning body can update or republish the work in the future. The historian may be willing to assign or share copyright, with or without payment, to the commissioning body.

In the case of a written history project, authors sometimes seek an entitlement to publish manuscripts in their own right should the commissioning body not do so within a reasonable time. For example, the parties may agree that the commissioning body notify the historian within twelve months of delivery of the manuscript that it does not intend to publish, thus freeing the historian to pursue publication.

The amount of material actually used in a final product commonly represents only a fraction of the total amount of data researched and assembled by the historian. It is usual for historians to decide the fate of these associated materials - retention for future use, deposit in a library or other repository, or, if relevant, transfer to the commissioning body. Bodies which deem it essential to have a copy of, or control over, the working papers and/or research materials should inform the historian of this requirement at the outset, and perhaps negotiate an exclusive use agreement. Any such negotiation may need to take into account the likelihood that the historian will have done prior research in the area and, consequently, will be building on his/her existing data rather than starting from scratch.

If the commissioning body intends to retain ownership of associated working papers and/or research materials, thus denying the historian opportunities of future use, it could mean that the body is actually negotiating a contract of employment. In these circumstances, the commissioning body could be liable for such things as worker's compensation insurance, superannuation, leave, and leave loadings.

It is desirable for original diaries, manuscripts and photographs obtained by the historian during his/her research to be deposited in the State Records Office of Western Australia, the J.S. Battye Library of West Australian History, or a local repository. Consideration should also be given to encouraging individual owners of important original material to lodge a copy of that material with an appropriate repository.

The commissioning body should be aware that there are specific permissions/releases, copyright and access issues associated with oral history projects and interviews. Should this form part of the required work, PHA (WA) advises that the commissioning body and/or the historian seek further information about these legal and ethical obligations from the [Oral History Association of Australia](#) or the [Oral History Association of Western Australia](#).



## **FURTHER ADVICE AND ASSISTANCE**

Clarification of matters raised in these guidelines can be obtained by writing to PHA (WA) Inc at PO Box 8381, Perth Business Centre, PERTH WA 6849, or by contacting [the Convenor of the Commissioned History Sub-Committee](#) through [the PHA \(WA\) website](#).

If required, PHA (WA) may be able to arrange for a consulting historian to give advice on both project and scope development and to assist a committee responsible for selecting a historian. For this service, the consulting historian would require a meeting fee, plus reimbursement for any travel or other reasonable expenses. Fees are available on request via [the Convenor of the Commissioned History Sub-Committee](#).

[The ACPHA website](#) also provides advice about commissioning a history. See the pages titled '[Why employ a professional historian](#)', '[How to find a professional historian](#)' and '[Commissioning a history](#)'.

## **PROFESSIONAL HISTORIANS ASSOCIATION (WA)**

### **Objects of the Association**

To promote the concept of professional history and research in the community.

To establish, maintain and promote a code of practice.

To maintain a Register of Professional and Associate members.

To advise members and prospective clients on desirable terms of employment.

To collect and disseminate information of professional and general interest to members.

To encourage further professional development by such means as seminars, workshops and publications.

To maintain links with similar organisations.