



# PHANZA: Code of Practice

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## **PHANZA Code of Practice**

### **Responsibilities to Clients**

- Undertake only research you are competent to perform
- Develop a realistic plan and carry out research with care and thoroughness
- Include from the outset in any agreement a provision for dispute arbitration by an appropriate independent person or body with historical expertise
- Set appropriate fees that reflect your professional status
- Inform your clients about project requirements
- Signal any major problems or challenges in a project
- Do your best to inform the client(s) of probable consequences of the project
- Keep your client(s) informed about progress and/or changes to the plan
- Gain all necessary permissions for the use of resource material
- Advise the client(s) to engage other expertise, where appropriate
- Use information gained in confidence according to agreements with the provider
- Report your findings accurately, promptly, and in a manner which serves the interests of your client, the profession and the public
- Maintain your professional obligation to interpret information independently in accordance with the principles outlined in this code

### **Responsibilities to those who Provide Information and Materials**

- Familiarise yourself with the appropriate copyright and privacy laws so that you can make sure that your informants know their status under the law
- Record and respect all agreements made with informants
- Respect the rights and wishes and property of informants
- Familiarise yourself with the NOHANZ (National Oral History Association of New Zealand) code

- of ethics before conducting a recorded interview
- Conduct interviews with sensitivity, integrity and common sense
- Represent the views of interviewees and correspondents accurately
- Acknowledge informants appropriately

### **Responsibilities to the Historical Profession**

- Keep up to date with developments in your field (s)
- Assist the professional development of other historians
- Give credit to others where appropriate
- Seek assistance (either paid or unpaid) from others solely on the basis of their ability to provide it
- Make your material publicly available as soon as practicable
- Be generous in discussing work in progress with other historians and students
- Acknowledge the diversity of historical scholarship and the right of others to take different approaches
- Provide an accurate and up to date account of your qualifications, experience and capabilities when representing them to others

### **Responsibilities to Other Professionals**

- Plan research so as to make the best use of your and others' time
- Behave courteously
- Observe the rules and procedures of institutions
- Respect the integrity of collections, research materials and other resources
- Acknowledge the professionalism of others and become familiar with their codes of practice and requirements

### **Responsibilities to the Public**

- Advocate the protection and conservation of historical resources
- Advocate open and free access to historical records
- Work for greater awareness and appreciation of history in the community
- Represent research responsibly, in a way that is a reasonable interpretation of the available evidence
- Report your findings accurately, intelligibly and to as wide a public as practicable
- Give your professional opinions and make public comments on historical matters when you are competent to do so

- Encourage the depositing of significant historical material in an appropriate repository
- Engage in conduct which is legal, ethical, reflects cultural sensitivities and enhances the status of historians in the public eye

Adopted at 1998 AGM

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