

## How to manage, catalogue and preserve your collections



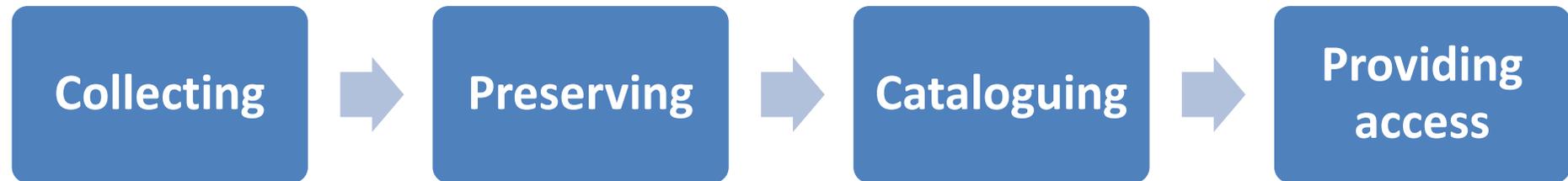
Creating a community archive may have been a deliberate decision, or it may have happened by accident. A successful project that generates a lot of local interest will often result in people checking their attic or cupboards and either offering to donate things to your group, or allowing you to make copies of them.

Regardless of the circumstances in which your archive or collection began, presumably it is your intention to keep it safe, and also to allow interested people to see the items you have collected. You therefore need to establish some basic principles that will ensure the items are kept in good condition (or in the condition they were on receipt, if you do not have the funds for conservation). You also need to set up a system that will allow you to find things, and can also allow others to find out what you are holding. Some basic ground rules for access will also ensure that the risk of damage is minimised.

It can be a good idea to establish roles and responsibilities among your group in respect of looking after your archives. This can help to prevent confusion and duplication of effort, and also ensures that it is not a single volunteer who is burdened with doing everything.

This guide will set out a series of recommendations for the steps that can be taken to manage, catalogue and preserve a community archive or collection. It is arranged in four key sections, which are summarised on the next page: collecting, preserving, cataloguing and providing access. If you have never managed an archive before (and most people have not), there will probably be far more points within here than you had even thought about. How many you choose to follow is ultimately up to your group. You may have to balance the ideal against the time it would take, and the cost that might be involved. However, this full list will help you to make that decision positively, rather than discovering later that you have overlooked something vital.

## Key activities



<ol style="list-style-type: none"><li>1. Defining the community archive's purpose</li><li>2. Deciding what to collect and what not to collect</li><li>3. Recording details of items collected and their associated terms and conditions</li></ol>	<ol style="list-style-type: none"><li>4. Providing a suitable storage environment (security, environmental conditions, etc.)</li><li>5. Using appropriate packaging materials</li><li>6. Establishing roles and responsibilities within the team</li></ol>	<ol style="list-style-type: none"><li>7. Understanding who the main users are and their needs</li><li>8. Sorting and arranging the collection</li><li>9. Cataloguing the collection</li><li>10. Publicising catalogues and finding aids</li></ol>	<ol style="list-style-type: none"><li>11. Setting your access rules</li><li>12. Creating a website to promote your collections</li><li>13. Understanding copyright</li><li>14. Creating exhibitions</li><li>15. Digitising items or collections</li></ol>
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## Collecting

It is good practice to define the purpose of your archive and to set out clearly what you will and won't collect at an early stage. This avoids 'grey areas' later on, which could lead to an element of ill-feeling in a small community. The Community Archives and Heritage Group has produced a helpful checklist, which is available at <http://tinyurl.com/mnr9559>

Think about the relationship between your archive and other archives, such as those in a local museum or in the county record office. Are your items purely of local interest, or might they be of wider significance? All archives are unique, but some documents are so special that they really should be held in a professionally-managed archive to ensure they are kept in optimum conditions. Do they relate to your village/topic/theme? If not, how will anyone know to approach you?

Policies for the acquisition (and disposal) of items are something every group will need to decide for itself, but you might want to think about the following:

- Are we going to accept everything offered that relates to the village/property/topic?
- If so, where are we going to store it?
- If not, what type of things do we want and what will we turn down?
- Will we accept duplicates of items we already have? (Not an issue with documents, but may be for artefacts.)
- What will we do when we run out of space?

It is important to record basic details about everything that you accept into your archive. Archivists call this 'accessioning'. It will help you when it comes to cataloguing your collection, and will also help to prevent later doubts about ownership and/or any access restrictions.

As a minimum, you should aim to record the following:

- Date of accession
- Name of depositor
- Name of creator, i.e. the writer of the document, photographer, etc. This may be the same as the depositor, but often isn't.
- Description: overview of the scope of contents
- Actual or estimated date of creation of records (e.g. 1910s, 1860-87, c. 1972, etc.)
- Related records, i.e. does this accession relate to an earlier deposit?
- Physical size of items - helps with space management
- Is the deposit a gift or a loan? Do any conditions attach?
- Is the depositor willing to let you reproduce the item in any way (e.g. in a publication)?
- Location: make sure you record where you will store the item, so you can find it again!

- Accession number: allocate each collection or item a unique identifying number (see below)
- Name of person recording this information

An 'accessions register' would bring all of this information together in one safe place.

It's good practice to fill in a form with these details while the person is there, to ensure you both know what has been agreed. For large deposits, you might prefer to fill it in later, and arrange to meet the person another day to go through it. You could then both sign it, and both keep a copy.

You should then check to see if any items left with you mention any named individuals. Items containing people's names may be governed by the Data Protection Act, 1998. Until you have the permission of the named person to allow others to see the item without restriction, you need to consider imposing a closure period before you allow access.

## Preserving

In a guide like this it is impossible to provide guidance for preserving every type of document or artefact, but there are two key considerations: environment and condition.

### a) Environment

- Keep items in a stable environment, with no extremes of temperature, light or humidity. Long-term preservation of documents requires no or minimal light, cool conditions (18-20°C) and relative humidity levels of 35-60%.
- Ensure there are no pests present (such as silverfish, rodents or mould).
- There should be no water pipes in or above the storage area, and no fire hazards.
- Have a sensible number of shelves for the items you are storing (and don't forget potential health and safety issues if boxes or items are heavy, or stored at height). Avoid placing archives on the floor, even if they are in boxes.
- Security is important. Documents are unique, so make sure only trusted people have access to the storage, and that you have a system for noting when items are taken out, even if only moved into the next room, so you can ensure they are returned.

### b) Condition

- Use cushions to support the spine of volumes when they are opened, and close the volumes after use.
- Never mend a torn document or hold papers together with sellotape, glue, staples or elastic bands. All of these can cause permanent damage to a document. If you need to keep papers together, use brass paperclips.
- If you wish to mark your archives with their unique reference numbers (see below) always use a pencil

- Avoid documents being torn when being taken from or returned to storage by keeping them in envelopes or folders.
- All envelopes, wallets and boxes used for storage need to be of archival quality. They do cost more, but inks can stick to non-archival wallets, and the acid in non-archival envelopes and boxes can damage documents.
- Ideally, place small or single page items in acid-free envelopes, which are then placed in acid-free boxes. Large volumes can be placed directly in acid-free boxes.

Good quality packaging and preservation materials (and also temperature and humidity gauges) can be obtained from many suppliers, for example:

- <http://www.preservationequipment.com/Home>
- <http://www.conservation-by-design.co.uk/home.aspx?pagename=home>
- <http://www.conservation-resources.co.uk/>

Of course, the ideal is not always practical for a community group with a low budget, but you should ensure that you consider the risks before making any compromises.

## Cataloguing

The overall purpose of collecting archives is to allow people to use them for learning, research or enjoyment. To do this successfully, you have to know what you've got and be able to find it when you look for it! Adding items to an ever-increasing pile doesn't achieve that, so you need to establish ways to categorise what you have. There are a number of ways in which a catalogue can be arranged, but before making a decision, it can be helpful to think about why someone might want to use your collection. For example, are your users all local people who visit your centre, or do people contact you from further afield, or via the internet? Do people generally want to know if you have specific items, or are their questions more general? Do people like to browse, or do they have very specific interests?

The most appropriate alternative ways of organising your items might be:

- By depositor
- By type of material, for example, photographs, newspaper cuttings, maps, printed ephemera
- By subject category, for example, church, school, street

This is known as the collection level (i.e. a collection of items from one person, or a collection of photographs, or a collection relating to the church, etc.), and you should assign a unique number or letter code to each collection level.

You can then subdivide your collection, for example you could sub-divide a collection of photographs by subject, or a subject collection by the type of material. Each subdivision is then given a unique number. You then arrange the items within each subdivision in some kind of logical order, and allocate a running number to each.

So if your top level is arranged by type of material, the catalogue references for all photographs might commence with PHO. At the next level, you might assign 1 to the parish church, 2 to the Baptist chapel, 3 to St Peter's school, 4 to the High Street, etc. Each item is then given a running number, starting at 1. So if you have three photographs of the parish church and two of the Baptist chapel, those of the parish church would therefore be catalogued under the references PHO/1/1, PHO/1/2, PHO/1/3, while the photographs of the Baptist chapel would be PHO/2/1, PHO/2/2.

As well as a unique reference number for each item, your catalogue needs to say what each item is and where it is located. The amount of information you provide is up to you. Long descriptions take time to complete, but can save trips to your store room as your enquirers will have better idea about whether they want to see an item.

The different categories of information in your catalogue may include:

- **The document reference number**
- **Title.** Keep this brief but meaningful, to capture the essence of the document (its form, and basic content). It can be helpful to think how it would look in a list (e.g. place name first?)
- **Date** (when the document was created): either a simple year, range or estimate (and make clear which)
- **Additional descriptive material** – capture as much as possible from those who know about the sources and locality
- **Theme or subject area**, for example church, school, etc. to assist in searching for and using the material
- **Keywords** – archive users have many interests, and are likely to ask questions such as 'do you have anything about ...' Think about the type of researcher who might be interested in the item and what they might ask to see
- **Format** (if not recorded in the title), such as photograph, sound recording, video
- **Copyright information** about photographs (name of photographer, details of copyright owner)
- **Physical characteristics** – whether the document is damaged, fragile etc.
- **Location of document**-shelf number, box number, etc.

There are a number of different options for how and where to record the cataloguing information. Your choice should be influenced by the needs of the people who will be using the material. Options include a spreadsheet, word-processed table, database, other (perhaps specialist) software, paper catalogue in ring binder, or a card index. Ideally, you want the option to sort by reference number, by topic and by keyword, so if you are not using a computer spreadsheet, database or similar, you might want to think about creating more than one index, with each organised in another way – for example a card index arranged by street and a ring binder arranged by keyword.

Once you have completed your catalogue, you need to think about how you will make this available. Will it only be accessible to you and fellow members of your group? Can it be physically browsed by members of the public? Are you going to share it with an online audience? The latter will potentially make your collection available to a far wider group of people, but of course it does depend on having a website!

The Community Archives and Heritage group have produced useful guidance on cataloguing and on cataloguing software.

See [http://www.communityarchives.org.uk/category\\_id\\_60\\_path\\_.aspx](http://www.communityarchives.org.uk/category_id_60_path_.aspx) [http://www.communityarchives.org.uk/page\\_id\\_122\\_path\\_0p4p55p39p.aspx](http://www.communityarchives.org.uk/page_id_122_path_0p4p55p39p.aspx)

## **Providing access**

There is little point in having an archive if no one can see the items it contains. As your collection contains items which have been entrusted to your group, it is useful to set some ground rules to make sure that they come to no harm while people are using them.

Excessive or incorrect handling of documents can cause rapid deterioration. Consider creating a short and simple list of good practice guidelines for working with archives such as:

- No food or drink when using the archives (including sweets and chewing gum)
- Pencils only
- Clean hands
- Touch the items as little as possible, and don't rest a notepad on them
- Wear cotton gloves when handling photographic material, particularly negatives
- Do not fold or lean on items from the collection
- Keep archives away from strong light sources (from windows, cameras and scanners).
- If you do allow people to take photographs of items, have a 'no flash' rule
- Keep bundles in the original order
- Use archive cushions, rests and weights where appropriate
- Do not let people borrow items (no matter who has asked)

You also need to let people know that your archive exists, and how they can access it. Think about how you will promote your archive, both within and beyond your village. A website is almost an essential these days, as the internet is the first place most people now look for information about almost anything. You may be able to find someone locally who is skilled in web design, and who will help you with this without charge, or one of your members may be able to help. The Community Sites website (<http://www.communitysites.co.uk/>) will give you some ideas of what can be done, and includes some good examples of websites.

Instructions on how to create a simple website for your group can be found in our guide for

community history and heritage groups: 'Using digital tools to publish and promote your project'.

The next section of this guide provides some guidance about copyright, but it is also relevant to mention it here. As the custodian of an archive, it is important to be aware of the rules which govern how you and others can make use of the items you hold. Copyright protects original, creative works from being copied without the prior consent of the creator. Documents, books, letters, photographs, film, artwork, music and sound recordings are all protected by copyright. If you do allow people to take photographs of items you hold, or if you want to provide a photograph of an item to someone who has contacted you by telephone, post or email, you need to ensure you are acting within the boundaries of the Copyright, Designs and Patents Act, 1988. The next section of this guide provides more information about copyright. If you do decide to allow someone to copy something you hold, you may want to record that, and keep a note of the person's name and address. You might also want them to sign a form undertaking not to copy or reproduce the item in any way, or to use it for any commercial purpose.

If your collections include information about living people, you must abide by the Data Protection Act, 1998. More advice about this can be found at: [www.ico.gov.uk](http://www.ico.gov.uk). A basic rule of thumb is to avoid including information about named individuals that was written or created within the last 100 years, unless you have that person's written permission to do so.

Archives can be used as part of an exhibition, but it is important to plan ahead to make sure they don't suffer irreparable damage. The two websites below give some useful pointers:

<http://www3.hants.gov.uk/archives/community-archives/how-to/exhibition-guidelines.htm>

<http://www.bl.uk/blpac/pdf/exhibition.pdf>

Key points to remember are:

- Avoid extremes of temperatures - avoid placing showcases next to radiators or lights
- Avoid excessive exposure to light (light damage is cumulative). Use blinds or overnight covers to reduce damage
- Consider using good quality copies instead of originals
- Consider mounting an on-line digital exhibition (but consider possible copyright restrictions on the material)
- Use lockable showcases rather than table tops, to minimise the risk of theft or accidental damage
- Support original documents with cushions or stands to minimise strain on bindings
- Use archival polyester sheets to protect photographs and prevent them curling

Digitising items or collections is beyond the scope of this guide, and can require a large budget. However, if you are interested in finding out more, see [http://www.communityarchives.org.uk/page\\_id\\_506\\_path\\_0p4p.aspx](http://www.communityarchives.org.uk/page_id_506_path_0p4p.aspx)

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