CoCA RESOURCE:
TOP TIPS FOR ORGANISING ARCHIVAL MATERIAL

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Who is this resource for?

1 **Organisations and individuals interested to ensure the long-term preservation and accessibility of archival material.**

How will this resource help you?

The resource is designed to help you consider:

- The right approach to organising archival material, based on the outcome you are looking to achieve.

- The resources you have and those you will require to complete this work.

- What the process of organising and cataloguing archival material entails.

The information presented in this resource is authored by Chris Webb, former Keeper of Archives at the Borthwick Institute, University of York. It was developed to support learning at a Collections Care Day, held on the 15 August 2019, as part of a CoCA Subject Specialist Network (SSN) events programme, funded by Arts Council England.

What do you want to achieve?

The first step to organising archival material is to understand what you are working to achieve. This will enable you to scope, budget, plan and deliver the programme of work. Consider which of the following best describes your aims:

- Quick finding aid for a limited, defined purpose; implication is that it will have to be done again, sometimes quite quickly.

- Comprehensive finding aid for permanent use and sharing; implication is that it will take time and expertise.

- Finding aid to support digitisation; implications for complexity and scale.

What resources do you need?

With an understanding of your aims, you can start scoping your project. Consider what resources you have, and in what quantity, and those you will need to acquire or buy-in:

- **Expertise:** the critical factor. Expertise in the subject area; expertise in creating finding aids. The latter is indispensable if you want a result that can be used many times by many people.

- **Money:** Once you have explored the range of things you need to budget for e.g. software, hardware, staff and volunteer time, archival storage materials etc., Archives Revealed and other guidance from **The National Archives** will help you consider the types of funding available to support archival projects. You may also be eligible to make an application to the **The National Lottery Heritage Fund** or **Arts Council England**.

- **Time:** you might need to make time to do what you want to do; or tailor your ambition to the time available; or apply for funding to expand your time/staff resource. To quantify the project timescale, it can be useful to pilot the processes that will be involved in the project, such as reviewing, sorting, weeding, repacking, cataloguing etc.

- **Support:** considering the time, resources and expertise you have, will inform whether you deem it necessary to seek help from a related archive; and/or via **consultancy** services.

Getting Going: Identify, describe, arrange, disseminate

- **Prepare:** there is plenty of information online to help you identify the right structure and level of detail for your catalogue, see in particular the resources, examples and advice made available by **The National Archives**.

- **Standards:** the Archives and Records Association maintains **up to date lists of, and links to standards**.

- **Legal framework:** copyright; see Tim Padfield's book **Copyright for Archivists and Record Managers**, **data protection** and **freedom of information**.

Step 1: Identify

- Go through the whole archive, piece by piece, keeping everything where you find it.

- Give every piece a temporary number that ties it to its description.

- Note condition problems.

- Tweet and blog constantly.

Step 2: Describe

- Descriptions are signposts for people who have not seen the item.

- Descriptions are a key preservation tool; a poor description can encourage a user to ask to see an item that, were the description doing its job, would otherwise stay safely in its box.

- Describe everything as you go, have an eye to arrangement, but keep an open mind until you come to the end of the description phase.

- Description can proceed from series to item. Thus, a series of notebooks might always have the same categories of information but differ only in date of creation.

- Tweet and blog constantly.

Step 3: Arrange

- Preserving and uncovering evidence is key, and that's what arrangement does; it is a vital foundational step in making an archive accessible and useable over the long term.

- Arrangement (or original order) is a key part of the evidence you are trying to preserve.

- The archive should guide you.

- You are trying to reflect an arrangement that the creator of the archive would recognise.

- Physical format is the last consideration in an intellectual arrangement, but the first consideration in a physical arrangement. The two should not be made to reflect each other.

- Intellectually related items should be linked.

- You should not end with a large 'miscellaneous' section.

- Arrangement is intellectually challenging and immensely satisfying. There is always more than one way to arrange an archive.

Step 4: Disseminate

- Intellectual Property Rights: see Tim Padfield's book **Copyright for Archivists and Record Managers**.

- **Data protection**

- **Freedom of information**

- **Access to Memory**

- **CALM collections management system**: widely used, but development is slow – it is worth exploring the range of products on the market. Details can be found in the **Museums Association Supplier Directory**.

- Tweet and blog constantly.

Step 5: Digitisation

- Digitisation is quicker if it comes after the finding aid is created.

- Digitisation has its own standards e.g. **International Image Interoperability Framework**

- Digitisation is best thought of as a one-off exercise rather than a quick fix.

  Examples:
  Archbishops' registers
  The Northern Way

Examples of catalogued archives:

Personal

- **MacCarthy-Foulds**
- **Rowntree Family Papers**
- **Earls of Halifax**

Institutional

- **Bootham Park Hospital**
- **Rowntree and Co**

Potters

- **Michael Cardew**
- **Bernard Leach**