The Postal Museum
Archive Collections Information Policy

1. Aim and background

Describing our archival holdings including The Royal Mail Archive[1] properly and professionally tells staff and users what we hold. It is a central part of the operation of a competent professional service and a key part of The Postal Museum's Archive Services Agreement[2] with Royal Mail and Post Office Limited. Documenting collections is a core part of fulfilling The Postal Museum's purpose to reveal 'the surprising and fascinating story of the first social network' and to make 'our extraordinary collections available and enjoyable for all'.

This policy will help ensure collection information is well managed and appropriately accessible and that information is held in a secure manner. It will assist the provision of access to archive material while balancing long-term preservation and legislative requirements as well as the cataloguing work of staff and volunteers.

From at least the 1960s onwards until the 1990s, Royal Mail Heritage (at this stage The Royal Mail Archive was managed internally by the postal business) produced hard copy catalogue listings and kept paper accession information. In time these started to be produced on computers.

In the early 2000s a Collections Management System (CALM) was purchased. In 2005 an online catalogue was launched and The Royal Mail Archive achieved designated status, which among other things required cataloguing to be managed professionally and strategically. Since the mid-2000s the proportion of our archive holdings catalogued and available online has remained very healthy.

Digital material coming into the collection is currently entered and catalogued in the same way as paper records. The Transfer of Title paperwork is designed to capture relevant metadata for these records. We recognise that as more digital material comes in we will need to do more to manage it in a way that preserves and makes it accessible long-term.

This policy sets the broad framework for archive information management. More detailed plans and procedures set out cataloguing priorities and give step by step instructions on producing information.

[1] The Royal Mail Archive is the business archive of Royal Mail Group Ltd and Post Office Ltd dating back to 1637
[2] The Archive Services Agreement is a legal agreement in which The Postal Museum agrees to manage The Royal Mail Archive until 2040 in exchange for an annual service fee

This policy applies to all archival material in the custody of The Postal Museum either now or in the future including any archive material not part of The Royal Mail Archive. Museum collection documentation is managed by a separate policy.

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2. Legislative context

The Royal Mail Archive (other than Royal Mail material produced after privatisation in 2013) consists of Public Record material and as such is governed by the Public Records Acts
1958 and 1967. The Postal Museum is licensed by The National Archives as a designated Place of Deposit.

The Freedom of Information Act 2000 and General Data Protection Regulation also help determine the way archive information is managed.

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3. Systems used

Axiell's CALM ALM is currently used for managing all aspects of collections information from initial entry into the Museum to cataloguing to ongoing management. Our online catalogue takes The Postal Museum's CALM data and puts it into Orangeleaf's Collections Base search portal database.

Selected hard copy catalogues are available in The Discovery Room and on request equivalent catalogues can be provided in a Word format attachment.

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4. Deposit and accessioning

Archive material enters The Postal Museum for several reasons, for example:

- as a transfer from a Royal Mail or Post Office Ltd department or from off-site semi-current storage (including via the public record Grigg System of 1st and 2nd review);
- as a gift from a donor, including unsolicited material;
- as a loan for an exhibition, conservation, or digitisation;
- as a purchase;
- for identification or temporary safekeeping.

Upon receiving an enquiry or offer of deposit the Senior Archivist establishes whether the material fits into the Archive Development Policy, checking also that the material is not a duplicate of material already held in the collection. Depositors complete Transfer of Title and if applicable Copyright Declaration forms. A standard letter of rejection is used when the material is not required by The Postal Museum.

An entry record should be completed in the CALM Entry and Accession database on the day of arrival of the material. The E[ntry] number is written in pencil on the envelope/packet/box.

The aim of an entry record is to:

- give material an auditable identifying number;
- ensure that The Postal Museum is able to account for all material left in its care;
- establish the terms and conditions under which material is being received for deposit and enable the material to be returned to the owner or depositor if required;
- establish rights and associated rights;
- enable staff to locate physically anything that has entered our care;
- capture key information about the deposit (name, address and telephone number of the depositor/owner, brief description);
- enable accurate and proper reporting of material coming to The Postal Museum for trustees and Royal Mail/Post Office Ltd.

Archive material or its enclosure is annotated with its entry number and in the case of Royal Mail Archive material its potential POST class and, after an initial period in the Quarantine Room where it is assessed by Conservation staff, boxed and placed in an appropriate space in the repository along with a print out of the entry record.

At the earliest appropriate time where we are sure material will permanently become part of the Archive (potentially when material is being catalogued but earlier in the case of some records) the entry will be turned into a formal accession record and an accession number assigned. CALM's Entry and Accession database acts an Accessions Register.

Paper copies of accession records and supporting documentation are placed in appropriate files.

Details of new archive material entering the collection are highlighted to The Postal Museum's Archive Board, Royal Mail and Post Office Ltd in quarterly reports and also go into The National Archives' annual Accessions to Repositories Survey.

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5. Disposal and withdrawals

As far as practical The Postal Museum seeks not to accession material likely to be disposed of later. Much material is explicitly selected for permanent preservation following Operational Selection Policy 51 and retention schedules. If during the process of detailed cataloguing it is decided not to keep specific items within a body of accessioned material they will as far as possible be offered back to the depositor and only disposed of with the depositor's permission (something that should have already been established during the entry process). Disposal will be recorded in the CALM Entry and Accession database and in the unlikely event that publicly available material is withdrawn, this will be noted on the online catalogue.

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6. Location and movement control

All archival material at The Postal Museum should have a location so that it can be found. For material which has not been catalogued this is indicated in the accession/entry record; all catalogued material should be linked to a valid location in CALM's location database.

Material may exit The Postal Museum for several reasons, for example:
- As a loan for exhibition purposes;
- As a loan for use by a Royal Mail/Post Office Ltd department;
- For conservation work to be carried out externally;
- To be copied or reproduced where facilities do not exist in-house;
- For permanent transfer to a new custodian.

All exits must be processed by the relevant Authoriser (Head of Collections, Senior Archivist, Senior Curator Philately, Senior Conservator) and potentially Royal Mail/Post Office Ltd's Departmental Records Officer (or equivalent) and The National Archives (TNA) on behalf of the Lord Chancellor.

In every case the following information is required to allow full accountability for all exits of material from The Postal Museum:
- Full details of receiving body, including contact details of individual responsible;
- Details of person giving authorisation for the exit, including position;
- Signature of both parties;
- Date.

This information is recorded in a specific form and key details are also recorded in CALM.

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7. Cataloguing

Archive material is catalogued on CALM's catalogue module using a standard template. The main standards relevant to our work are: the International Standard for Archival Description (General) – ISAD (G) 2nd edition, the International Standard Archive Authority Record for Corporate Bodies, Persons and Families - ISAAR (CPF) 2nd edition, Rules for the Construction of Place Names – National Council on Archives (NCA) rules and the UK Archival Thesaurus. The work of the cataloguing team should adhere to these, as well as other standards (such as those laid down by the National Archives).

When ready for public dissemination CALM catalogue data goes onto the online catalogue. Search filters and subject tags are added to make the online catalogue easier to use, as well as to draw attention to some of the stories and themes in our Museum and to encourage exploration across all our holdings. The filters and tags are controlled by taxonomies maintained by the Archivist (Cataloguing). Additionally, user feedback is taken into account; for example, artist name tags are being added

to the online catalogue after several requests from users to have a way of exploring visual materials held by artist.

In April 2018 over 100,000 Archive catalogue records were available online; about a fifth (19,000) also have digitised images attached for exploration, with more records earmarked for digitisation at a later date. These include photographs, posters, artworks, philatelic items, and other formats. The Postal Museum has a well-equipped Digitisation Studio and high-quality digital capture can be done entirely on site.

According to a 2004 strategy, 3% of the Royal Mail Archive was catalogued to a sufficient standard to be published immediately (on CALM), 8% after editing, 85% needed major work on existing finding aids, and 4% was completely uncatalogued. In 2018 these figures had shifted to approximately 87% published online, 7% needing editing, 3% with a finding aid requiring work and 3% uncatalogued.

Where The Postal Museum has a surrogate copy of an item (on microfilm or, in the case of a published item, a duplicate copy) this will be primary means by which the item is consulted. The catalogue will alert public users to the surrogate means of access.

Catalogued material may on occasions be closed and this is indicated in its catalogue record. Some Public Record material will be subject to the 20-year rule transition timetable. Other material may have extended closures for data protection or other exemptions from the Freedom of Information Act. In a small number of cases where the file title indicates the name and data protection reason for closure the description itself will remain closed and will not be published online until an extended closure date. On other occasions material may be in too delicate a state for access (as determined by Conservation staff). Very occasionally material will have gone missing and this again is indicated.

In addition to material stored at The Postal Museum the online catalogue also includes records of some material stored at BT Archives that was once part of The Royal Mail Archive until the separation of British Telecommunications from the Post Office. In the past The National Archives' online catalogue used to replicate much of the information available in hard copy or online about The Royal Mail Archive. This has been simplified so that only summary records at series level and above are available via TNA's Discovery which points researchers to The Postal Museum's online catalogue for more detail.

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8. Staffing and Funding

All archive staff have some involvement in ensuring good quality information is recorded about material. Currently the team consists of eight people (including the Senior Archivist), six of whom are professionally qualified. Information is overseen by the Senior Archivist and a dedicated role of Archivist (Cataloguing). Other cataloguing work can be done by volunteers (overseen by an archivist) or as part of discrete project-based funding. The Museum levies an annual service charge to

Royal Mail and Post Office Ltd according to a Service Level Agreement to manage the Archive including providing appropriate information on its contents.

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9. Protecting archival information

The CALM Collections Management System provides the main record of collection items. This is backed up on a nightly basis and these backup copies are stored off site. Paper copies of entry records are also created by printing the records and these are stored separately from the digital copies in a lockable cupboard. The CALM system is a widely used system and regular updates are provided to the software. All data is also exportable from the system in several standard formats, including XML meaning data can be transferred to a new system should the need ever arise.

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10. Implementation and Review

This policy (approved by the Archive Advisory Board in July 2018) will be communicated to The Postal Museum staff, and to external agencies and others with an interest on demand. It will be reviewed every two years.

July 2018