

Cataloguing guidelines for community archives

These guidelines are designed to help small heritage projects and community archives catalogue their collections. They have been developed by the Community Archives and Heritage Group (CAHG). This second edition of the guidelines was issued in 2017.

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1. Why have we created these guidelines?

There are an increasing number of community heritage groups round the country building up collections, sometimes in association with a local record office or museum and sometimes not. A study by the Community Archives and Heritage Group (CAHG) in 2007 estimated the number of these groups at between 3000-5000.

The enthusiasm and energy of the groups make these community collections a fantastic heritage asset for the country. However, the groups catalogue and present their material in very different ways, and frequently seek guidance on the issue.

Professional cataloguing standards can be somewhat intimidating for non-archivists, so here we offer guidance on a minimal standard for cataloguing that aims to be realistic and user-friendly. We have tried to keep the guidance short and simple.

If you follow these guidelines, the records kept by your heritage project will be consistent with existing widely-used professional catalogue standards (see Section 7 for details). As a result, the heritage in your care will be easier to share with others, and easier to preserve in the years to come.

2. What do the guidelines cover?

The guidelines cover the information you should record about:

- Individual items in your collection
- Groups of items in your collection (if you decide to organise the collection into groups)

Individual items in your collection

By an item, we mean a photo, or an oral history interview, or a document such as a letter or a map.

Your community archive may contain a collection of physical items (for example, original photos) or you might have a digital collection (for example, scans of photos). The guidelines are designed to fit both purposes.

The information you should record about each item in your collection is listed in Section 5 of these guidelines. Many heritage projects have limited time to catalogue their collections, so the guidelines divide up the information into three categories: essential, recommended and optional. If you're short of time, just record the essential information.

Groups of items in your collection

You may decide to organise the items in your collection into groups. This isn't essential, particularly if your collection is small, but many organisations and projects choose to do this.

If you do decide to organise items into groups, the information you should record about each group is listed in Section 5 of these guidelines.

The grouping of items in a catalogue usually reflect where the items came from (their 'provenance') rather than the subject-matter of the items. For example, if a set of items were given to the archive by a particular person, organisation or business, or were originally found together in a particular box in an attic, they should be catalogued as a group, rather than be split up according to subject.

On this basis, the organisation of your catalogue might reflect:

- Individuals that contributed to the collection (e.g. photos from John Smith)
- Projects that contributed to the collection (e.g. an oral history project)
- The way the collection was originally arranged when you found it (e.g. in separate boxes in an attic or cupboard)

This doesn't mean that you cannot also search or index your collection by subject-matter. A common way of doing this is to add keywords to the subject field of the catalogue. However, the underlying organisation of your catalogue should reflect the way in which the items came to you.

3. The structure of your catalogue

As described above, your catalogue might just consist of a simple list of items, or it might include records covering groups of items. Indeed, it might even have groups within groups.

To decide on the best structure for your catalogue, let's review the different ways in which archivists and museum curators approach cataloguing. What follows is a simplification of

the actual process, but it illustrates two ways in which you might set about cataloguing your collection, which we'll call the 'top-down' and 'bottom-up' approach.

The 'top-down' approach

The catalogues of county record offices contain lots of groups within groups. This is because professional archivists take a 'top-down' approach, which involves starting by creating a set of what you might call 'overview' records.

When a new collection of material arrives from, for example, a local sports club, the archivist first creates a single catalogue record which gives an overview of that entire collection. This overview record includes a field called 'Extent' which describes the entire contents of the collection. For example, it might say: "Contains 2 boxes of photos and six boxes of assorted minute books and documents".

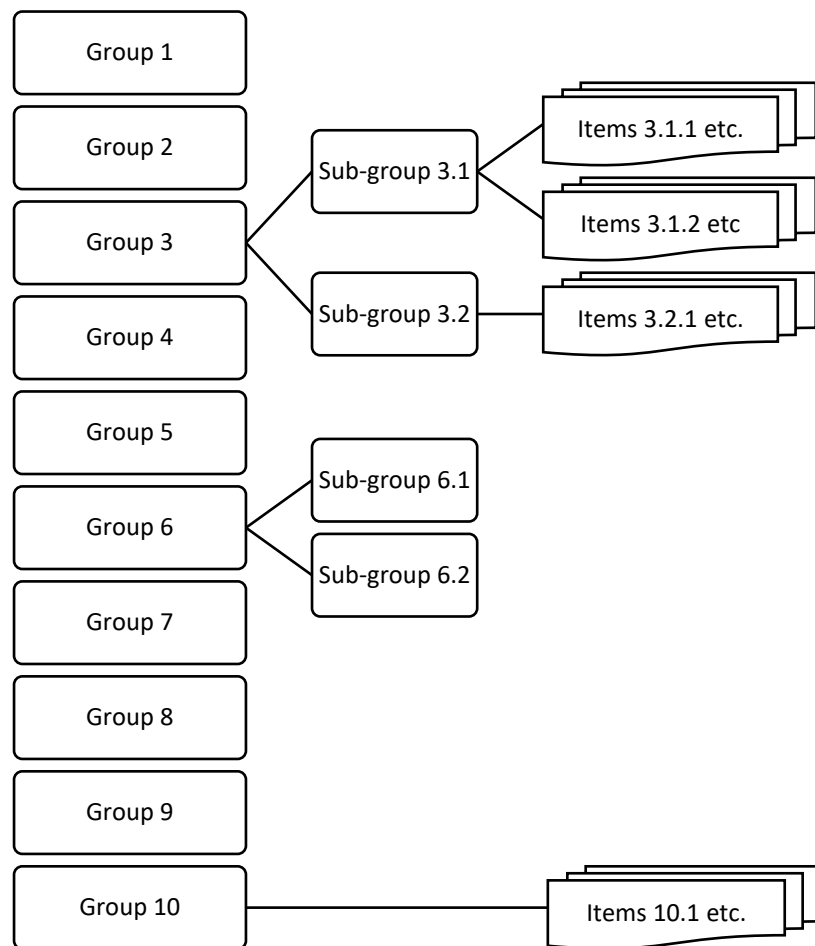
Then, when time allows, the archivist will open the boxes and create another overview record for each box (or group of records in that collection). For example, the overview record for the first box might say: "Contains three folders, each containing approximately 100 old photos of Anytown Marathon".

Similarly, the archivist might in due course create an overview record for each folder within the box.

Finally, the archivist would open the folders and create a catalogue record for each individual item (in this case, each individual photo). At that point, the archivist is describing individual items that could be scanned or photographed. In practice, though, some collections in county record offices are not catalogued down to 'item' level, simply because there isn't always enough time to do so.

So, the structure of an archival catalogue will consist of a set of top-level group records. Some of these groups will contain other groups within them, and some of these sub-groups might contain item records.

The diagram below illustrates this.



The 'bottom-up' approach

Museum curators, on the other hand, do not routinely create top-level overview records as described above.

By and large, they start with individual items (which are often objects in the case of a museum) and catalogue these item-by-item as they arrive at the museum. However, if necessary, they might group together a large collection of objects donated by the same person.

As a result, museum reference numbers might just be a simple running series of numbers such as:

0001
0002
0003
etc.

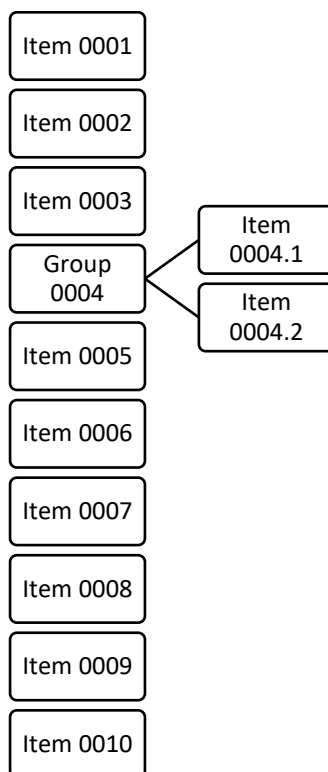
If a donation to the museum consists of many different objects, then the reference number might include a 'part' number, such as:

0004.1
0004.2

0004.3

etc.

So, the structure of a museum catalogue will consist of a long list of item-level records. The catalogue might also contain some group-level records.



Which approach to cataloguing is best for you?

There is no right or wrong answer to this question. However, the following questions might help you make up your mind.

Do you have close links with a local museum or a local archive?

If your group or project has close links to a local museum and might one day pass over a copy of your catalogue or collection to that museum, it makes sense to follow a similar cataloguing approach to the museum, and start out by recording your collection from the bottom up, item by item.

Similarly, if your group or project has close links with the local record office, it makes sense to catalogue your collection along the same lines that the local record office does. In this case, you would start from the 'top down' by creating a set of top-level group records.

Do you have a very big existing collection of physical material to catalogue?

If your community archive is well-established, and you have a room full of boxes of papers and old photos, it would take a long time to catalogue all this material item by item. For this reason, there's a practical advantage to taking the 'top-down' archival approach of starting by creating overview records. This means you can create a top-level description of the sets of material in your archive fairly quickly. If you do this, remember that the way you group

the material should normally reflect its 'provenance' (sets of material contributed by the same person or project) rather than its subject-matter (sets of material about a particular topic).

On the other hand, if you are creating a new collection from scratch, you may find it simplest to follow the 'bottom-up' approach of cataloguing your material item by item as it comes through the door.

Do you have an existing catalogue?

If your collection is currently catalogued in any way at all, even if it is just a rough listing on paper, you may find that the structure of your current catalogue already reflects one of the structures described above. In this case, you could consider sticking with the same approach in future.

4. How should you create your catalogue?

These guidelines are intended to help you decide *what* information you should record, rather than *how* you should record it. This is therefore not the right place to provide recommendations for cataloguing software. However, here are a few general points:

1. We suggest that your catalogue is recorded in some kind of spreadsheet, database or cataloguing software. If you just type your catalogue into word-processing software, it may be much more difficult to move it elsewhere in the future. You might end up copying and pasting a lot of entries! (It is sometimes possible to export from tables in Word into a database, but only if the tables have been structured in a particular way.)
2. There are many types of cataloguing software available. Some groups or organisations even design their own. However, you should make sure the software has an export facility. This means that, if you need to move your catalogue to some other software at some point in the future, you can do so.
3. If you have a particular organisation in mind that might one day look after a copy of your catalogue, such as the local record office, we suggest you talk to them about the form in which they might import your catalogue (for example, from a spreadsheet).
4. If you decide to follow the 'top-down' approach to cataloguing described above, your catalogue will consist of hierarchies of groups of records in a 'tree' structure. However, not all cataloguing software allows you to do this. So you should check that your choice of cataloguing software supports the planned structure of your catalogue.

5. Information you should record about your collection

Your catalogue should consist of a standard set of information fields, which are given below.

Many of the fields should be completed whether you are recording information about a single item in your collection (e.g. a photo) or a group of items (e.g. an overview of a contribution from a local club). However:

- Some fields are normally only completed for single items. For example, the digital filename field, because each filename can only correspond to a single item.
- Some fields are normally only completed for groups of items. This is because if you are creating an 'overview' record about a group of items, that's the place to record any information which applies to all the items in the group. You don't need to repeat the same information when you create catalogue records for each individual item. So, if a group of photos relates to a particular person, record biographical information about the person at group level but not at item level.
- As a rule, the information you record at item level is likely to be much briefer than the information you record at group level.

The guidelines divide up the information you could record into three categories: essential, recommended, and optional. If you're short of time, just record the essential information. The essential fields are at the top of each table below.

You can see examples of sample catalogues on the Community Archives and Heritage Group web site at www.communityarchives.org.uk.

5.1 Information you should record about individual items

Reference	Essential	This is the unique reference number of the item. See the explanatory note about reference numbers. <i>EXAMPLE: JES/001/001 (reference for the first item in the first group of the John Edward Smith collection)</i>
Title	Essential	Free-text. The title should be brief (no more than one line) and ideally unique. <i>EXAMPLE: Photo of Jane Black firing the starting-gun for the first Anytown charity marathon</i>

Filename	Essential if digital asset	<p>If there is a digital file associated with the catalogue record (e.g. a scan of a photo), then the filename must be recorded. Ideally, the filename should be based on the reference number. Digital filenames should not include any spaces (use underscore instead).</p> <p><i>EXAMPLE: ANY_1_1.wav</i></p>
Level	Essential if catalogue is organised into groups	<p>This indicates whether you are recording information about a single item or a group of items. If there are multiple levels in your catalogue (i.e. there are groups within groups), then you should give names to the different levels of the hierarchy (e.g. collection, group, sub-group, item etc.). See the explanatory note about levels.</p> <p><i>EXAMPLE: Item</i></p>
Extent	Optional for individual items	<p>Indication of the number of items and the type of items. The number of items will always be 1 for an item-level catalogue record.</p> <p><i>EXAMPLE: 1 photo</i></p>
Description	Recommended	<p>Free-text. This field is used to expand upon the information in the title field if necessary. For single items, you may not require a description because the title will contain all the necessary information.</p> <p><i>EXAMPLE: This audio interview covers John Smith's childhood in Anytown, his international athletics career, the origins and organisations of the first Anytown charity marathon, and an account of the first marathon held in 1995.</i></p>
Format	Recommended	<p>Here you describe the type of item it is. You could use a pick-list of simple types, such as: Still image, Moving image, Sound, Text. Many community archives come up with their own pick-list of common formats (such as Photo, Map, Will, Letter, Leaflet etc.).</p> <p><i>EXAMPLE: Map</i></p>
Place	Recommended	<p>This is the geographical area to which the item relates. You should put the general location before the more specific details of the location – so the name of the town should come before the name of the street.</p>

		<i>EXAMPLE: Anytown, Broad Street</i>
Date of coverage	Recommended	<p>This is the time period the item covers. For example, an oral history interview created in 1999 could cover the period 1960-80.</p> <p>As this field might be searched by computers, use clear numeric date ranges, such as 1940-1949, instead of verbal expressions as 'post-war' or 'the 40s'. Months should either be given in full or abbreviated to 3 letters. For days, do not use the suffixes 'st', 'rd', 'th'.</p> <p>Avoid saying the date is 'unknown' or 'not dated'. Instead, give an approximation of the date using a wide date range and explain any imprecision or uncertainty in the Description field. You can use circa ('c') to indicate a possible span of five years before or after the date given. Square brackets may be used for derived dates.</p> <p><i>EXAMPLE: 1965-1995</i> <i>EXAMPLE: c1950</i> <i>EXAMPLE: [1960]</i></p>
Date of creation	Recommended	<p>This is the date that the item was originated: for example, the date an old postcard was first created, or the date an oral history interview took place.</p> <p>Guidelines for expressing dates are as for the Date of coverage field.</p> <p><i>EXAMPLE: 3 March 1998</i></p>
Recorder	Recommended	<p>The person who created the record in the catalogue. Cataloguing software may record this information automatically.</p> <p><i>EXAMPLE: Green, Mary</i></p>
Date of recording	Recommended	<p>The date the catalogue record was created or last edited. Cataloguing software may record this information automatically.</p> <p><i>EXAMPLE: 23/4/2007</i></p>

Subject	Optional	Here you can record keywords that describe the item, often separated by commas. See the explanatory note about subject and keywords.
Creator(s)	Optional if the same as recorded at higher level	<p>This is the person who created the item: for example, took the original photo, created the original postcard or reminisced about her memories to create the oral history interview.</p> <p>Surnames should go before first names and the person's role in creating the item should be stated. If the creator isn't known, put 'unknown'. Be consistent in the formatting of names.</p> <p>There might be more than one creator. If so, put both names, but always separate the two names in a consistent way (in the example below, with a semi-colon).</p> <p><i>EXAMPLE: Smith, John (interviewee); Jenkins, Greg (interviewer)</i></p>
Contributor(s)	Optional if the same as recorded at higher level	<p>This should be the name of the person who contributed the item to your collection: for example, the member of the public who brought in a photo or the volunteer who did an oral history interview. There may be more than one contributor. If so, put both names, but always separate the two names in exactly the same way (for example, with a semi-colon). Surname should go before first name.</p> <p><i>EXAMPLE: Smith, Beryl</i></p>
Consent form number (also known as accession form or deposit form)	Optional if the same as recorded at higher level	<p>Contributors to your archive should always sign a consent form granting permission for the material to be published or conserved. These consent forms are sometimes called 'accession forms'. Each consent form should normally have its own reference number. This should be recorded in your catalogue so that you can tie together the catalogue record with the consent form. See Appendix 3 for a sample consent form.</p> <p><i>EXAMPLE: 2009.12 (reference number of the twelfth consent form signed in 2009)</i></p>
Copyright	Optional if the same as recorded at higher level	<p>This should provide information who owns the copyright of the item. See the explanatory note about copyright.</p> <p><i>EXAMPLE: Eric Booth (photographer)</i></p>

Access	Optional if the same as recorded at higher level	<p>This should provide information about how the item can be viewed or re-used. You can simply put 'open' or 'closed'. Put an explanation if the item is closed. See the explanatory note about access.</p> <p><i>EXAMPLE: Open</i></p>
Licence	Optional if the same as recorded at higher level	<p>This should provide information about how people can use the item – for example, whether they can download or republish a picture. See the explanatory note about licensing.</p> <p><i>EXAMPLE: Content released under Creative Commons BY-NC-ND 4.0</i></p>
Storage location	Optional if the same as recorded at higher level	<p>The storage location of the item, plus the date when the item was last seen at that location. Update this field if the item is moved.</p> <p>This field might also be completed for a digital item – for example, to record its location on a particular computer drive or the location of a set of DVDs.</p> <p>If the physical object is retained by the contributor, rather than the archive, then this should be indicated with a standard wording (e.g. 'Original document in the care of the contributor').</p> <p><i>EXAMPLE: Store, shelf 2, box 4, 23/4/2007.</i></p>
Language	Optional if the same as recorded at higher level	<p>The language of the item.</p> <p><i>EXAMPLE: English</i></p>

5.2. Information you should record about each group of items

Reference	Essential	<p>This is the unique reference number of the group of items. See the explanatory note about reference numbers.</p> <p><i>EXAMPLE: JES (reference number for a group of items contributed by John Edward Smith to the Anytown Community Archive)</i></p>
Title	Essential	<p>Free-text. The title should be brief (no more than one line) and ideally unique.</p> <p><i>EXAMPLE: Interviews and photos relating to the first Anytown charity marathon</i></p>
Level	Essential	<p>If there are multiple levels in your catalogue (i.e. there are groups within groups), then you may want to give names to the different levels of the hierarchy (e.g. collection, group, sub-group, item etc.). See the explanatory note about levels.</p> <p><i>EXAMPLE: Sub-group</i></p>
Date of coverage	Essential	<p>This is the time period the group of items covers. Use clear numeric date ranges, such as 1940-1949. At a group level, refer only to whole years, not months or days.</p> <p>Avoid saying the date is 'unknown' or 'not dated'. Instead, give an approximation of the date using a wide date range and explain any imprecision or uncertainty in the Description field. You can use circa ('c') to indicate a possible span of five years before or after the date given. Square brackets may be used for derived dates.</p> <p><i>EXAMPLE: 1975-1995</i></p>
Storage location	Essential	<p>The storage location of the group of items plus the date when they were last seen at that location. Update this field if the items are moved. This information might also apply to digital items – for example, to record their location on a particular computer drive or the location of a set of DVDs.</p> <p><i>EXAMPLE: Store, shelf 2, box 4, 23/4/2007.</i></p>

Extent	Recommended	<p>This field is particularly useful if you are recording information about a group of items. It indicates the number of items in the group and the type of items (e.g. documents, photos).</p> <p><i>EXAMPLE: Approximately 100 hand-written letters and postcards</i> <i>EXAMPLE: 10 interviews and 150 photos.</i></p>
Description	Recommended	<p>Free-text. The description should mention any people, organizations and events relating to the group of items.</p> <p><i>EXAMPLE: The first Anytown charity marathon took place in 1995 to raise funds for the local hospital. This group of items consists of photos of the event plus interviews with prominent organisers and participants, including local athlete John Smith and the Mayoress Deborah Phillips. The photos are mainly taken on the day of the marathon and show the runners preparing for and taking part in the race</i></p>
Place	Recommended	<p>The geographical area to which the group of items relates (e.g. East Brighton). You should put the general administrative district before the more specific details of the location.</p> <p><i>EXAMPLE: Anytownshire, Anytown</i></p>
Contributor	Recommended	<p>This should be the name of the person who contributed the group of items to your collection. This person should have signed a consent form making the items available to your archive. Contact information, such as address details, should not be included in the catalogue and should be stored separately.</p> <p>There may be more than one contributor. If so, put both names, but always separate the two names consistently (for example, with a semi-colon). Surname should go before first name.</p> <p><i>EXAMPLE: Smith, Beryl</i></p>
Consent form number (also known as accession form or deposit form)	Recommended	<p>Contributors to your archive should always sign a consent form granting permission for the material to be published or conserved. These consent forms are sometimes called 'accession forms'. Each consent form should normally have its own reference number. This should be recorded in your catalogue so that you can tie together the catalogue record with the consent form. See Appendix 3 for a sample consent form.</p> <p><i>EXAMPLE: 2009.12 (reference number of the twelfth consent form signed in 2009)</i></p>

Copyright	Recommended	<p>If all the items in a group have the same copyright status, then indicate this at group level. See the explanatory note about copyright.</p> <p><i>EXAMPLE: Eric Booth (photographer)</i></p>
Access	Recommended	<p>If all the items in a group have the same access status (open or closed), then indicate this at group level. Put an explanation if the items are closed. See the explanatory note about access.</p> <p><i>EXAMPLE: Open</i> <i>EXAMPLE: Closed until 2040 by instruction of contributor.</i></p>
Licence	Recommended	<p>This should provide information about how people can use the group of items – for example, whether they can download or republish a picture. See the explanatory note about licensing.</p> <p><i>EXAMPLE: Content released under Creative Commons BY-NC-ND 4.0</i></p>
Recorder	Recommended	<p>The person who created the record in the catalogue. Cataloguing software may record this information for you.</p> <p><i>EXAMPLE: Green, Mary</i></p>
Date of recording	Recommended	<p>The date the catalogue record was created or last edited. Cataloguing software may record this information automatically.</p> <p><i>EXAMPLE: 23/4/2007</i></p>
Creator(s)	Optional if the same as recorded at higher level	<p>This is the person who created the group of items: for example, took a set of photos.</p> <p>Surnames should go before first names and the person's role in creating the item should be stated. If the creator isn't known, put 'unknown'. Be consistent in the formatting of names.</p> <p>There might be more than one creator. If so, put both names, but always separate the two names in a consistent way (in the example below, with a semi-colon).</p>

		<i>EXAMPLE: Jones, Mary (photographer)</i>
Subject	Optional	Here you can record keywords that describe the item or group of items, often separated by commas. See the explanatory note about keywords.
Language	Optional	The language of the group of items. <i>EXAMPLE: English</i>

6. Explanatory notes about particular fields in the guidelines

These guidelines are intended to be short and simple, rather than comprehensive. Links to sources of more information on these subjects can be found at www.communityarchives.org.uk.

Reference numbers

If you are organising your collection into groups, your system of reference numbers should reflect these groups. For example, archives often use a three-letter code as an acronym for a collection of material, and numeric references for sub-groups and items within that collection. For example:

JES	the acronym for the entire collection of material received from John Edward Smith
JES/1	a folder of photos in the John Edward Smith collection
JES/1/1	the first item in the first folder of photos
JES/1/2	the second item in the first folder of photos

You should also consider 'zero-padding' the reference numbers, so that when they are sorted on a computer you can be sure they will appear in the right order. For example, the number 12 will sometimes appear above the number 2 if it is listed on a computer, but the number 002 will always appear above the number 012.

Zero-padding would make the reference numbers above look like this:

JES	the acronym for the entire collection of material received from John Edward Smith
JES/001	a folder of photos in the John Edward Smith collection
JES/001/001	the first item in the first folder of photos
JES/001/002	the second item in the first folder of photos

Levels

If your catalogue is going to contain a hierarchy of records (groups within groups), then you should decide what to call each level of the hierarchy.

County records office catalogues are so big that they have a hierarchy of up to seven levels. Professional archivists use traditional names for these levels such as 'fonds' and 'sub-fonds'.

However, most community archives need just four levels in their hierarchy. You could call these levels whatever you like. For example:

1. Collection
2. Group
3. Sub-group
4. Item

In the example above, 'collection' is the name of the highest-level overview record. 'Item' is the name of the lowest level record, which describes an individual item that can be scanned, such as a photo or a document.

Digital filenames

The filenames you use for digital files, such as scans, should ideally reflect the reference numbers of the items in your catalogue. This may not be essential, because you might have cataloguing software which records which file belongs to which catalogue record, but it's a good practice if possible.

Filenames shouldn't contain forward slashes or spaces, though, so replace any punctuation in the reference number with underscores. For example, the filenames might be:

JES_001_001.tif

JES_001_002.tif

If more than one image is associated with a particular item, you could reflect this in the filename. For example:

JES_001_001_image1.tif

JES_001_001_image2.tif

Subject and keywords

Keywords are a popular way of providing information about the subject-matter of your collection.

To be really useful, though, you should work from a master list of keywords (a 'controlled vocabulary'), rather than letting each individual cataloguer make up their own keywords. This ensures that any one concept is described using only one authorized keyword.

Most community archives devise their own master list of keywords. Alternatively, there are existing 'controlled vocabularies' available which cover particular disciplines such as the social sciences. However, these are often too big and complicated to be much use to community archives.

If you are not going to use a master list of keywords, there may be little point in using the subject field at all. Computers and search engines like Google are very good at searching blocks of text, so one pragmatic approach is just to make sure that all relevant terms are included in the description field of the item.

Consent form reference (also known as accession form or deposit form)

It is very important and good archival practice for all the contributors to your archive to sign a consent form. This consent form typically grants the archive the right to preserve, copy and republish the items being contributed. It also outlines any restrictions on access to the material. The form usually includes the contact details of the contributor.

At county record offices, these consent forms are known as 'accession forms'.

The accession forms used by record offices often ask for the copyright of the items to be re-assigned to the archive. However, this is often not possible or necessary for community archives (see the copyright section below).

There is a sample consent form for community archives in Appendix 3.

It is good practice to give each consent form its own reference number. This could just consist of the year plus a running number. For example, the consent forms signed in 2006 might be numbered:

2006.1

2006.2

2006.3

etc.

You should consider whether to record the consent form reference in your catalogue record for that item. This is optional, but might help you find the right consent form quickly if necessary.

Copyright

These guidelines aren't intended to provide guidance on copyright issues and this paragraph does not constitute legal advice. There are links to some simple introductions to this subject on the www.communityarchives.org.uk website, which will only take you a few minutes to read.

In terms of your cataloguing, however, a few points about the copyright:

- Often, community archive projects don't ask the contributor to re-assign the copyright; instead, the consent form just grants a license to reproduce and use the item in question. Indeed, if your group is only run by volunteers, this approach may well be your only option. Many volunteer organisations are 'unincorporated associations' which do not have the legal status to collectively own any property (copyright is a form of property).
- For this reason, the 'copyright holder' field of your catalogue will usually contain the name of the person who originally held the copyright of the item (for example, the original photographer).
- Often, you won't know the copyright holder, and so you will need to leave the copyright field blank or just write 'unknown'.
- You also need to bear in mind that volunteers will retain the copyright in material they create, unless you ask them to sign a consent form as well. For example, a volunteer who records an oral history interview will hold an element of copyright in the recording.

License

While the copyright field gives information about the owner of the item, the license field tells the users of the archive what they can do with the item. For example, if a scan of a photo is attached to a catalogue record, the license field indicates if the user has permission to download or republish that photo.

In 2012, the Heritage Lottery Fund decided to ask the projects which it funds to use a Creative Commons licence for their digital content, so anyone can access and re-use the content for non-commercial purposes, so long as a credit is given.

You can find out more about this at the Heritage Lottery Fund website (www.hlf.org.uk) and the Creative Commons website (<https://creativecommons.org/>). The sample consent form in Appendix 3 uses a Creative Commons license.

Access

The access field provides information about any restrictions on access to the items in your collection. For example:

- Some material may have been donated to your collection on condition that it is not made publicly available for a certain number of years. In this case, you might record in the access field, 'Closed until 2040'.
- The donor may ask to be consulted each time there is a request to view the material. In this case, you might write in the access field, 'Closed without the written permission of the contributor'.

These situations are likely to be exceptions. Normally, the items in your collection will be open to the public to view, and you can simply enter the word 'open' in this field.

7. How these guidelines relate to widely-used cataloguing standards

These guidelines are based on widely-used cataloguing standards. This means that if you ever want to incorporate your catalogue within the catalogue of a professional institution (such as a record office), it should be easy to do so. The standards are:

ISAD(G)

This is the international standard for cataloguing archives.

Dublin Core

This is a very widely-used international standard for many types of cataloguing.

Appendices 1 and 2 shows how the fields in these guidelines relate to the fields in the standards above.

8. Credits, version history and feedback

These guidelines were written by Jack Latimer of www.communitysites.co.uk for the Community Archives and Heritage Group.

The first version of the guidelines was published in 2009, based on consultation with William Stocking and David Dawson. This second revised version of the guidelines was published in 2017, and was based on consultation with Andrew Flinn and Tamsin Mallett.

Many thanks are due to the professional archivists and community groups who reviewed the draft guidelines.

Any feedback about these guidelines and your use of them would be very much appreciated. Please send feedback to catalogue@communityarchives.org.uk.

APPENDIX 1: MAPPING OF FIELDS IN COMMUNITY ARCHIVE CATALOGUING STANDARD TO ISAD(G)

Reference	ISAD(G) 3.1.1 Reference code
Title	ISAD(G) 3.1.2 Title
Description	ISAD(G) 3.3.1 Scope and content
Level	ISAD(G) 3.1.4 Level of description
Creator	ISAD(G) 3.2.1 Name of creator
Format	<p>If the field contains a simple picklist term describing the type of object (e.g. Map, Photo, Document), then append to ISAD(G) 3.1.5 Extent and medium of unit of description.</p> <p>If the field contains a free-text field with details of the format, then it maps to ISAD(G) 3.4.4 Physical characteristics and technical requirements.</p>
Subject	Probably not applicable, as this field, which is for keywords, is not in ISAD(G). However, the software used by an organisation which imports the records may record keywords by other means, so may still want to import the keywords, particularly if the community archive is using the same controlled vocabulary as the receiving organisation.
Extent	ISAD(G) 3.1.5 Extent and medium of unit of description

Place	Not a distinct field in ISAD(G), so append to ISAD(G) 3.3.1 (Scope and content).
Date of coverage	Not a distinct field in ISAD(G), so append to ISAD(G) 3.3.1 (Scope and content).
Date of creation	ISAD(G) 3.1.3 Dates of creation
Language	ISAD(G) 3.4.4 Language of material
Contributor	ISAD(G): 3.2.4 Immediate source of acquisition or transfer
Consent form number	Append to ISAD(G): 3.2.4 Immediate source of acquisition or transfer
Copyright	ISAD(G): 3.4.2 Conditions governing reproduction
Licence	Append to ISAD(G): 3.4.2 Conditions governing reproduction
Access	ISAD(G): 3.4.1 Conditions governing access
Filename	ISAD(G): 3.2.4 Custodial history NB There is no agreed field for this. Some record offices use Custodial History, but others record filenames as an Alternative Reference Number.

Storage location	Not applicable, as the storage location in the record office will be different than the storage location in the community archive. There is no ISAD(G) field for this.
Recorder	ISAD(G) Archivist's note 3.7.1 but it is probably not necessary to migrate this information.
Date of recording	ISAD(G) Date of Description 3.7.3 but it is probably not necessary to migrate this information.

APPENDIX 2: MAPPING OF FIELDS IN COMMUNITY ARCHIVE CATALOGUING STANDARD TO DUBLIN CORE

Reference	DC Identifier
Title	DC Title
Level	See note at the foot of this table.
Description	DC Description
Creator	DC Creator
Subject	DC Subject
Extent	DC Description (NB This is a pragmatic approach. Ideally, you would create multiple DC Format and DC Extent fields for each of the different types of media described in this field e.g. sound, still images, text etc.)
Format	If the field contains a simple picklist term describing the type of object (e.g. Map, Photo, Document), then DC Type. If the field contains a free-text field with details of the format, then DC Format.
Place	DC Coverage (spatial)
Date of coverage	DC Coverage (temporal)
Date of creation	DC Date
Language	DC Language
Contributor	DC Contributor

Copyright	DC Rights
Licence	DC accessLicence
Consent form number	DC accessLicence
Access	DC accessRights
Filename	DC Identifier
Location	Not applicable, as the storage location in the receiving organisation will be different than the storage location in the community archive.
Recorder	DC Contributor recorder, but it is probably not necessary to migrate this information.
Date of recording	DC Date.cataloguing, but it is probably not necessary to migrate this information.

Dublin Core has a 'flat' structure, which means that all the records are at the same level, instead of being grouped in a hierarchy. If you have recorded information about your collection using the hierarchy of collection/group/item, then, when the information is migrated to Dublin Core, the following fields could be used in order to record the relationships between your information.

DC Relation Is Part of	<p>In the case of an item, this field would contain the reference number of the group to which the item belongs. For example, a record about an item with a reference number ANY/003/023 would contain the reference number of the group to which it belongs (ANY/003).</p> <p>Similarly, in the case of a group (ANY/003), this field would contain the reference number of the collection to which the group belongs (ANY).</p>
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DC Relation Has Part	<p>In the case of a group of items, this field would contain the reference number of all the items which belong to the group. For example, a record about a group with a reference number ANY/003 would contain the reference number of all the items which belong to it (ANY/003/001-ANY/003/024).</p> <p>Similarly, in the case of an overall collection with a reference number ANY, this field would contain the reference number of all groups which belong to that collection (ANY/001-ANY/011).</p>
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Appendix 3: Sample Consent Form

Introduction:

This form provides consent for material deposited with the [NAME OF COMMUNITY ARCHIVE] to be made available for public access under a Creative Commons Attribution-Non-Commercial-Share-alike Licence.

In general terms, this means that anyone can view, share and republish the material so long as:

- Creators and contributors are acknowledged
- The material is only used for non-commercial purposes

The purpose of using this license is ensure that the material is as accessible and widely-used as possible. For example, a school or other educational establishment will be able to make free use of the material, without the need for a separate licensing agreement.

The details of this Creative Commons License are at <http://creativecommons.org/licenses/by-nc-sa/2.0/uk/>

Giving consent does not represent a transfer of ownership of rights from creators or contributors. In other words, copyright is not affected.

To be completed by contributor

I hereby consent to the material listed below to be made available under the above conditions and to have a Creative Commons Attribution-Non-Commercial-Share-alike Licence applied to it. I confirm that no third-party rights are affected in doing so:

SIGNED..... DATED.....

Name	
Role in Work (e.g. creator or contributor)	
Address:	
Tel	Email

To be completed by community archive

CONSENT FORM REFERENCE:

List of works: (expand table if needs be)

Title	Type e.g. Oral History Recording