

Guidance for Volunteer Cataloguing in Archives

Kevin Bolton and Sue McKenzie

This document was produced for The National Archives by [RedQuadrant](#). It was written by Kevin Bolton and Sue McKenzie.

Cover image: Huntley Archives volunteer (Courtesy of London Metropolitan Archives, City of London)



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Contents

1. Introduction.....	4
2. Why should archive services use volunteers for cataloguing?.....	6
3. How to successfully use volunteers for cataloguing	7
3.1 Establish clear aims and objectives	7
3.2 Define roles and responsibilities	9
3.3 Could the project be delivered online?.....	11
3.4 Use the knowledge and expertise of volunteers	12
3.5 Invest in training and support.....	15
3.6 Create good documentation	17
3.7 Use an archivist for preparation work	26
3.8 (Don't just) box list	28
3.9 Think creatively about space.....	32
3.10 Use a group approach.....	33
3.11 Build in quality control.....	34
4. Detailed Case Studies.....	36
4.1 Gloucestershire Archives.....	36
4.2 Made in Greater Manchester.....	39
4.3 Connected Catalogue – University of St. Mark and St. John (Marjon)..	42
4.4 London Metropolitan Archives – The Huntley Archives	44
4.5 University of Aberdeen Special Collections.....	47
4.6 Marks & Spencer Company Archive	49
4.7 Heritage Heroes	51
4.8 Staffordshire and Stoke-on-Trent Joint Archives Service	53
4.9 Wigan Archives and Local Studies	56
4.10 National Library of Wales.....	58
4.11 Bristol Archives – Artspace Ltd.....	60
5. Make a start.....	62
6. Checklist.....	63
Appendix 1 Further reading and information - archive volunteering	64
Appendix 2 List of people interviewed for case studies	65

1. Introduction

The number of volunteers working in the archive sector is significant and growing. This guidance looks at the role volunteers can play in archival cataloguing.

In 2015-2016 4,238 volunteers contributed 375,291 hours in local authority archives in England, Scotland and Wales. The Archives and Records Association (ARA) 2014 *Managing Volunteers* study reported:

"A huge majority of [respondent] services engage volunteers in records description and cataloguing (93%), conservation and preservation (85%), and sorting and arranging records (74%), with about half using them for scanning and digitisation projects".¹

The ARA's Policy on Volunteering in Archives (2011) is endorsed by TNA and Archive Service Accreditation.² The policy recognises the enormous contribution made by volunteers to supporting archive services: they provide hugely needed 'added value' support.

However, it does not consider that volunteers can or should be used to replace appropriately experienced professional or para-professional staff as the principal stewards of our unique documentary heritage.

This guidance is not suggesting a 'one size fits all' approach - each archive service has their own priorities, target audiences and each collection is different but certain parts of the guidance will be relevant to all services and collections. The guidance covers:

- The role volunteers can have in cataloguing, while maintaining that the intellectual control for the catalogue's arrangement lies with an archivist.
- When to use voluntary assistance and how the volunteers can best be trained and supported throughout the cataloguing project.
- Methods and techniques for archives to ensure the work done by volunteers is accurate and of an appropriate standard.
- A set of case studies focussing on successes, challenges and lessons learned.

In addition to archival cataloguing, this guidance covers indexing, transcription, and catalogue enhancement.³

¹ Caroline Williams, *Managing Volunteers in Archives* (Archives and Records Association, 2014) http://www.archives.org.uk/images/documents/ARACouncil/ARA_Managing_Volunteering_in_Archives_2014_Foreword_and_Executive_Summary.pdf

² Archives and Records Association, <http://www.archives.org.uk/careers/volunteering.html>

³ For definitions of archival description and arrangement see ISAD(G): General International Standard Archival Description - Second edition - <http://www.ica.org/en/isadg-general-international-standard-archival-descriptin-second-edition>. An excellent overview of ISAD (G) is given by "ISAD (G): The Basics" by the Archive-Skills consultancy - <http://www.archive-skills.com/infobytes/isad-g.pdf>.

This guidance does not:

- Specifically cover audio-visual materials, but some parts of it are relevant for 'hybrid collections'.
- Explore in detail the ingest or processing of born digital records although this does feature in the Gloucestershire Archives case study (see 4.1).
- Discuss archive volunteering recruitment and management in general. There are several excellent publications that already cover this (see Appendix 1).

2. Why should archive services use volunteers for cataloguing?

Volunteer cataloguing produces positive outcomes for our understanding of collections but the impact will be much wider than this. The benefits for collections knowledge include:

- Increased access – cataloguing backlogs are reduced and collections opened up to users.
- Knowledge and expertise – volunteers bring their own knowledge and expertise, skills and experience and can contribute to staff knowledge of the collections.
- Perspective - volunteers bring a different voice to cataloguing. They help generate ideas about new ways of cataloguing.
- Collections development – volunteers help services identify, prioritise and fill gaps for future collecting.

For the repository, the benefits include:

- Promotion – volunteering programmes help raise the profile of archive services within their organisation and community.
- Funding – involving volunteers helps secure external funding and identify new and varied funding sources?.
- Archive Service Accreditation – the scheme recognises the positive benefits of volunteering in archives.

And for the volunteers themselves, the benefits include:

- Health and wellbeing – volunteering supports mental and physical health and helps reduce social isolation.
- Skills development – volunteers develop new skills from cataloguing such as digital, palaeography, and research.

3. How to successfully use volunteers for cataloguing

This section outlines the key things services will need to consider and do when using volunteers for cataloguing. Each part contains:

- Key advice –what to think about and do.
- Practical examples - including links to the case studies in section 4.
- Further information and example templates.

3.1 Establish clear aims and objectives

Key advice

At the start of a project, there will be a variety of ideas about what the project will achieve and how this will be done. 'Project Initiation' develops these ideas into a planned and resourced project. The purpose of 'Project Initiation' is to establish clear objectives and structure for managing the project. What are you trying to achieve with your volunteer cataloguing project? Which collections have you chosen and why? Is it part of a wider strategy to reduce your cataloguing backlog?

Practical examples

- The [Greater Manchester Archives and Local Studies Partnership \(GMALSP\)](#) deliver staff workshops to plan all new projects and workstreams. This ensures objectives are clear and all partners are involved in the planning process. Each new project and workstream creates a Project Initiation Document which is then signed off by the GMALSP Board.

Further information

- Use the template below to help formulate the project document.

GMALSP Project Initiation Document template

Name of Project/Workstream	
Project Lead	
Date	
Background	<i>Brief description / background of project.</i>
Objectives	<i>Briefly describe the project's aims and objectives. What are the benefits that will be realised?</i>
Link to corporate objectives	<i>How do the aims and objectives link back to your parent authority's corporate objectives?</i>
Scope	<i>State what is included in the project's scope and what is out of scope.</i>
Constraints	<i>Outline anything that will impact the project and mean that it may not be able to deliver to schedule.</i>
Risks and mitigation	<i>State any project risks and how these will be mitigated? Are there any conservation concerns?</i>
Resources	<i>What are the resources required to deliver the project?</i>
Roles and responsibilities	<i>What are the role and responsibilities for the key personnel within the Project. It should be clear from this what the escalation lines are as well as who should be delivering what.</i>
Key Milestones / Initial Project Plan	<i>What are the key milestones for the project?</i>

3.2 Define roles and responsibilities

Key advice

As part of 'Project Initiation' you should also define the roles and responsibilities of both volunteers and staff. Identify the tasks volunteers and staff will engage in. Involve staff and other stakeholders (e.g. Trade Unions) in drafting volunteer role descriptions.

Practical examples

Tasks done by volunteers and staff in the case studies:

Volunteers	Staff
<ul style="list-style-type: none">• Cataloguing series of records or photographs• Item/piece level cataloguing• Transcribing• Catalogue enhancement• Research to help inform cataloguing• Remote volunteering (see section 3.3)• Indexing e.g. names, places• Box listing (see section 3.8)• Packaging or cleaning• Digitisation or photography• Simple appraisal e.g. removing duplicates• Assisting with quality control	<ul style="list-style-type: none">• Arranging and sorting the collection• Undertaking initial cataloguing• Appraisal• Creating documentation• Delivering training• Quality control• Supporting / supervising the volunteers

Further information

- [NCVO resources on volunteer management](#)
- [Tameside Local Studies and Archives Volunteer Role Description](#) (with a strong emphasis on cataloguing)

Gloucestershire Archives - example volunteer role description

Role title:	Manorial Project Researcher
Responsible to:	[<i>Specific contact name</i>] (Manorial Project Archivist)
Where:	At Gloucestershire Archives; a limited amount of research possible in other repositories and at home.
Commitment:	At a time to suit you and the Manorial Project Archivist.
Duration:	Deadline for completion by [<i>exact date, if appropriate</i>]
Purpose:	To undertake research into the existence of manors throughout the historic county of Gloucestershire.
Tasks:	Researching as directed by the Manorial Project Archivist in published histories and finding aids both onsite and online; to identify evidence of the existence of manors and to keep clear records of all sources checked.
Requirements:	<ul style="list-style-type: none"> • An interest in archives and experience in using catalogues and research • A good working knowledge of computers is desirable • An ability to work without direct supervision • A methodical approach to research
What's in it for you:	<ul style="list-style-type: none"> • The opportunity to enhance existing understanding of catalogues and archive repositories • The satisfaction of contributing to a major national project revising the register of manorial records • An opportunity on an occasional or regular basis to meet other archives volunteers
Notes:	Gloucestershire Archives will be responsible for welcoming the volunteer into the office, providing an induction and orientation around it, health and safety training and training for the specific task.
For more information contact:	[<i>Include specific contact name, address, telephone number and email</i>]

3.3 Could the project be delivered online?

Key advice

Today's digital world has opened up new opportunities for remote volunteering or crowdsourcing. It is important to choose the right collection and task for the project. Remote volunteering works well with indexing, geo-tagging, transcription and enriching descriptions. Some projects have developed their own online tools, but there are also free tools available e.g. Flickr, Dropbox.

Practical examples

- [National Library of Wales](#) – The Cynefin project has created an online resource which can be freely accessed to research the tithe maps and their indexes in an efficient and innovative way. In order to create the online resource, a crowdsourcing website was created to allow anyone to contribute to the project by volunteering online to transcribe or geo-reference. A new project is currently being developed, focusing on interpreting a large collection of photographs to capture the social history of areas of north Wales. This involves building a template for an online crowdsourcing platform, which will also be suitable for similar work with other photographic collections held.
- [Heritage Heroes](#) - In 2014 Shropshire Council received Arts Council England and Renaissance Strategic Support fund to create new innovative sustainable business model for the delivery of museums, arts, archives and the visitor economy. The project included a strand to enable the development of an innovative crowdsourcing approach to enable people to volunteer to support the county's heritage collections (archives and museums). Users registered which enabled them to undertake tasks such as transcription, research collections, spell check, make general modification, sort and catalogue photographs, scan and classify documents.
- [The National Archives](#) has developed several opportunities for online collaboration. They are encouraging users to help tag and contribute to their records, both in their online catalogue, Discovery, and on other interfaces such as the photo-sharing website Flickr. [Operation War Diary](#) allows users to read recently digitised First World War diaries and tag key pieces of information on each page.

Further information

- Dr. Mia Ridge, *Crowdsourcing Our Cultural Heritage* (Farnham, 2014) gives an excellent overview of crowdsourcing and includes eight project case studies. The introduction is available on the Open University repository: [Crowdsourcing Our Cultural Heritage: Introduction](#).
- [Crowd consortium](#) - comprises a mix of libraries, archives, museums and other cultural heritage organizations all over the world engaged in exploring the potential for crowdsourcing. Their web site includes several good case studies and resources.

3.4 Use the knowledge and expertise of volunteers

Key advice

Volunteers bring external relevant knowledge and expertise, skills and experiences both beyond and about the collections. A skills audit at an early stage will assist with matching volunteers to tasks. For example, they could have local knowledge, language or technical skills. When recruiting, volunteers need to understand what knowledge and expertise you require. Volunteers also bring a different perspective and diverse voice to cataloguing. They help generate ideas about new ways of cataloguing.

Practical examples

- [Marks & Spencer Company Archive](#) – one volunteer is a fashion student and working on the garment collection. Another volunteer is an employee and has a good understanding of the label codes used in garments.
- The [Fielding and Platt project](#) at Gloucestershire Archive has benefitted from the expertise the volunteers brought: a former senior manager with the firm advised on the codes and numbering systems used by the firm; a retired engineer and a draughtsman helped to make sense of technical records; and the firm's photographer explained how Fielding's promoted its products.
- The volunteers at [University of Aberdeen Special Collections Centre](#) bring a wide range of skills. One volunteer is multilingual and catalogues the medieval and estate collections. A former engineer helps catalogue the business records and plans. A rare book volunteer has catalogued the Hebrew collections.
- [Connected Catalogue – University of St. Mark and St. John](#) - the volunteers have had input into cataloguing and creating finding aids, which will positively affect future users by offering an accessible alternative to the professionally created standard. They evaluate how and why people search, what new search terms and tools might mean to the archive sector and how they can be placed to adapt and respond.

Further information

Below is an example template for auditing the skills of a volunteer.

Volunteer skills audit – generic template

Name:

Click here to enter text.

1. What is/was your main professional field of activity?

Click here to enter text.

2. Please mark each relevant field, while expanding on your experience within that field.

Skill/speciality/knowledge/qualification (x)		More information on your experience/qualification in the field
Academic/Research	<input type="checkbox"/>	Click here to enter text.
Human resources	<input type="checkbox"/>	Click here to enter text.
Education and Training	<input type="checkbox"/>	Click here to enter text.
Archives and Libraries	<input type="checkbox"/>	Click here to enter text.
Business	<input type="checkbox"/>	Click here to enter text.
Conservation	<input type="checkbox"/>	Click here to enter text.
Craft	<input type="checkbox"/>	Click here to enter text.
Legal	<input type="checkbox"/>	Click here to enter text.
Visual media	<input type="checkbox"/>	Click here to enter text.
Finance	<input type="checkbox"/>	Click here to enter text.
Digitising	<input type="checkbox"/>	Click here to enter text.
Culture / Heritage	<input type="checkbox"/>	Click here to enter text.
Work in the community	<input type="checkbox"/>	Click here to enter text.
Administration	<input type="checkbox"/>	Click here to enter text.
Science	<input type="checkbox"/>	Click here to enter text.
Tourism and Leisure	<input type="checkbox"/>	Click here to enter text.
Health / Disability	<input type="checkbox"/>	Click here to enter text.
Hospitality & Customer Care	<input type="checkbox"/>	Click here to enter text.
Marketing and Communication	<input type="checkbox"/>	Click here to enter text.
Data input	<input type="checkbox"/>	Click here to enter text.
Management (people or scheme)	<input type="checkbox"/>	Click here to enter text.
Information Technology	<input type="checkbox"/>	Click here to enter text.
Topography	<input type="checkbox"/>	Click here to enter text.
Trustee / Director	<input type="checkbox"/>	Click here to enter text.
Other	<input type="checkbox"/>	Click here to enter text.
		Click here to enter text.
		Click here to enter text.

3. Motivation

What is your motivation to volunteer?

Click here to enter text.

4. New fields

If the opportunity arose, would you be particularly interested in and / or would you like to be more involved with any other aspects of our work?

Click here to enter text.

This information is for the Volunteering Scheme only – we will not share the information with any other parties.

Thank you.

3.5 Invest in training and support

Key advice

Good quality training and support improves the volunteer experience and the quality of their work. Volunteers value good training, induction and staff support⁴. Use the results of the skills audit to develop a volunteer training plan. Think how you can deliver training differently. For example, could you develop joint training with other services or use experienced volunteers to deliver the training?

Practical examples

- [Made in Greater Manchester](#) - in 2016, the Greater Manchester and Archives Partnership secured funding from the Heritage Lottery Fun to raise awareness of business archives. Over 50 volunteers have played a key role undertaking cataloguing, research and digitisation of uncatalogued business collections. The collaborative approach has enabled the partnership to develop a joint training programme for volunteers (including cataloguing training and an annual Volunteer Awards event).
- [National Library of Wales](#) - volunteers are encouraged to join in-house training, such as digitisation, editing Wikipedia, family history, crowdsourcing and conferences. A strong partnership with the People's Collection Wales (PCW) programme has meant volunteers have benefited from accredited digitisation training while scanning and providing metadata for over 6,000 images for PCW's website.
- [London Metropolitan Archives](#) some of the volunteers who have been there for longer working on an established project help new volunteers with induction and training, alongside staff support.
- [Staffordshire Record Office](#) - an Archivist invested a lot of time at the beginning of the Staffordshire Quarter Sessions project to develop the skills of the volunteers e.g. types of documents, palaeography. Continuing support for learning is key to the project's success. The volunteers have now become very skilled in interpreting these records.
- [University of St Mark and St John \(Marjon\)](#) – the emphasis of training is on 'why' we archive, not necessarily 'how'. However, as part of the project each volunteer is given basic training in handling material, Data Protection, copyright and Freedom of Information. Project management 'workshops' have been ongoing - to encourage usable workplace and life skills External training offered has included a Wiki Editathon (a session where Wikipedia editors work together to improve Wikipedia coverage in a particular area) and family history.

⁴ See results of Caroline Williams, Volunteering in Archives 2014 (Archives and Records Association,, published February 2015) - http://www.archives.org.uk/images/Volunteering/Volunteering_in_Archives_in_2014_Final.pdf . This also came out strongly in the workshop undertaken by Headland Design with volunteers from Wigan Archives.

Further information

An example of the components of a training session for volunteers comes from the Made in Greater Manchester project.

Made in Greater Manchester cataloguing training outline (0.5 day)

- **What is cataloguing and why do we do it?**
- **Consideration of context - what is it and why it is important**
- **The Art of Description - what exactly are we describing and why, what do we need to include to make it a good catalogue entry**
- **Introduction to box listing and terminology**
- **Practice item listing**
- **Final discussion of listing practice**

3.6 Create good documentation

Key advice

Alongside the training, good and simple volunteer guidelines and templates are essential. This improves the quality of their work and ensures projects run smoothly. Good training and documentation make quality control easier.

Practical examples

- [Made in Greater Manchester](#) – The Greater Manchester Archives and Local Studies Partnership has developed joint templates and guidance for volunteers. They also have joint cataloguing standards. [Gloucestershire Archives](#) have also developed several good templates and guides for volunteers.
- [Stoke-on-Trent City Archives](#) - there is a field in the collection management system that provides instructions directly to the volunteers e.g. list each item in the description field; add covering dates in the date field; some items may be suitable for digitising/transcribing; index names.
- [Heritage Heroes](#) – Shropshire Archives have developed [online video tutorials](#) and guidance for their remote volunteers. They also delivered training at the archive and in local libraries for remote volunteers who lived in the County.

Further information

- [Cataloguing guidelines for Community Archives](#) – produced by the Community Heritage and Archives Group.
- Below are example templates from The National Archives, Gloucestershire Archives, Stoke-on-Trent City Archives and Hull History Centre.

The National Archives – template for uploading to Discovery

MYC Template draft [Compatibility Mode] - Excel Kevin Bolton

File Home Insert Page Layout Formulas Data Review View Nitro Pro ACROBAT Tell me what you want to do

C3

	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Level Of Description	Title	Name Of Creator(s)	Scope And Content	Reference Code	Covering Dates	Start Date	End Date	Extent	Physical Characteristics	Dimensions	Language	Former Refere
2	3.1.4	3.1.2	3.2.1	3.3.1	3.1.1	3.1.3			3.1.5	3.4.4		3.4.3	3.1.1
3													
4													
5													
6													
7													
8													

select the position of the material in the collection's hierarchy

MYC Template draft [Compatibility Mode] - Excel Kevin Bolton

File Home Insert Page Layout Formulas Data Review View Nitro Pro ACROBAT Tell me what you want to do

C3

	N	O	P	Q	R	S	T	U	V	W
1	Language	Former Reference	Conditions Governing Access	Subjects	Legal Status	Accruals	Administrative/Biographical History	Finding Aids	Publication Note	Related Units Of Description
2	3.4.3	3.1.1	3.4.1			3.3.3	3.2.2	3.4.5	3.5.5	3.5.3
3										
4										
5										

select the position of the material in the collection's

MYC Template draft [Compatibility Mode] - Excel Kevin Bolton

File Home Insert Page Layout Formulas Data Review View Nitro Pro ACROBAT Tell me what you want to do

C3

	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
1	Related Units Of Description	Immediate Source Of Acquisition	Arrangement	Note												
2	3.5.3	3.2.4	3.3.4	3.6.1												
3																
4																
5																

select the position of the material in the collection's

Gloucestershire Archives: Fielding and Platt project guidance

The following tasks could usefully be done before the catalogue is complete

1 Hydraulic Quotes

Description: 98 files of office copies quotations for hydraulic installations, 1960s. The files consist of carbon copy letters incorporating the specification. Each has a header which includes a unique number in the reference.

Task: check the earliest and latest quotation in each file. They seem to be filed in chronological order, but the tricky thing is identifying the last in the file, as there are no dividers.

Location: files 286 – 382 acc 9445, boxes 99035 – 99061; file 410 acc 8851, box 20535

Sample entry:

Acc. number	Catalogue reference	Title (short description)	Covering date/s	Description (further detail)	No.of Docs	Location	Physical condition [if poor or unfit for handling]
7883	D7338/	File 351	Mar - May 1964	Covering numbers 51720 - 52000	1 file	99053	[only if anything to report]

2 Drawing Office Order Books

Description: 50 order books with details of order and drawing number. The books are numbered 1 – 51 (17 missing) and date from the 1890s to 1977. Most are in reasonable condition. There is also an earlier one, preceding this series, which has already been listed

Task: adding additional information - months and start and end order numbers. Once completed, next stage of task could be to add further description about individual orders - for example, products and customers' details

Location: vols 1 – 51, acc 8851, boxes 20536 – 20556

Sample entry:

Acc. number	Catalogue ref	Title (short description)	Covering date/s	Description (further detail)	No.of Docs	Location	Physical condition [if poor or unfit for handling]
7883	D7338/	Drawing Office Order Book Number 4	Mar 1907 - Dec 1908	Orders 7513 - 7905	1 vol	20537	[only if anything to report]

3 Patents

There aren't many of these, but they are a bit scattered and out of order.

Description: envelopes or bundles of patents for various products, 1950 – 1970s, in one box and two bundles.

Task: to be bundled by year and papers relating to same patent kept together. Once sorted, then individual patents can be listed.

Location acc 9445, box 99004 (whole box); box 99008 (one bundle); box 99032 (a few mixed in with agreements)

Sample entry:

Acc. number	Catalogue ref	Title (short description)	Covering date/s	Description (further detail)	No.of Docs	Location	Physical condition [if poor or unfit for handling]
7883	D7338/	Patents	Jan - Dec 1950	Patent for	1 bdl	99004	[only if anything to report]

4 Photos

Description: run into thousands. Some contained in albums, many others loose and many duplicated. Concentrate on albums initially.

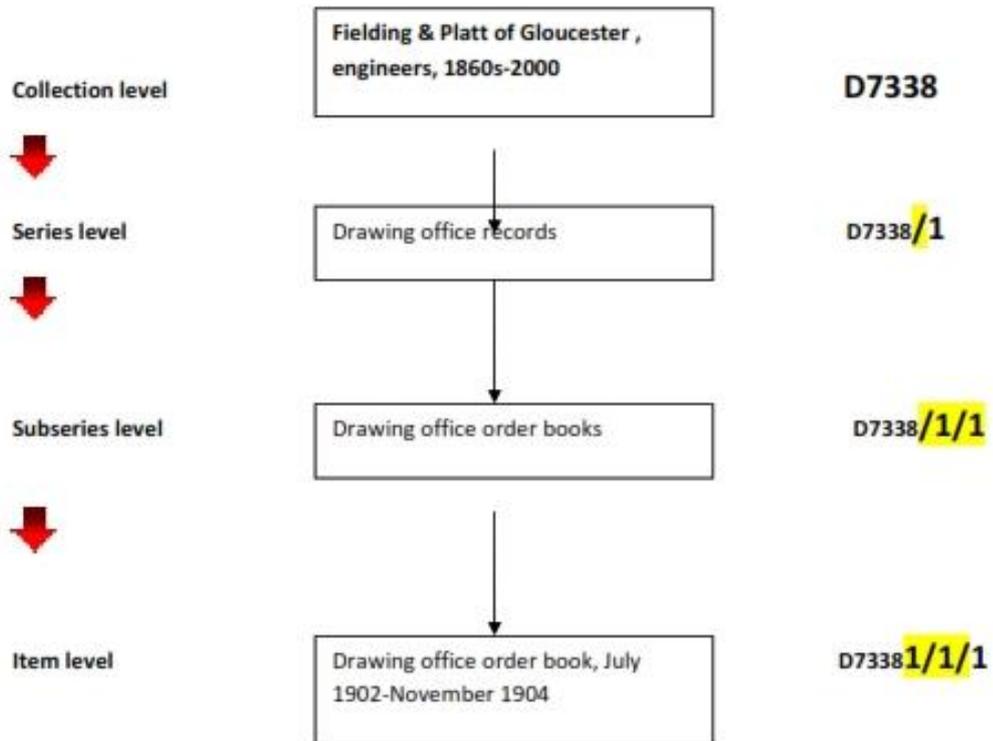
Task: provide description of individual photos

Sample entry

Acc. number	Catalogue ref	Title (short description)	Covering date/s	Description (further detail)	No.of Docs	Location	Physical condition [if poor or unfit for handling]
7883	D7338/	Photo album for 'portable riveters'	1910-1920		1 volume	99004	[only if anything to report]
				Page 1:			
				Page 2:			
				Page 3: (etc)			

Gloucestershire Archives: catalogue tree handout

Example of the catalogue 'tree'



Information we need to gather for 'item level' (each column in this table matches a data field in the online catalogue):

Document reference	Title (short description including months + years)	Covering years	Description (further detail)*	Number of items	Box number
D7338/1/1/1	Drawing office order book, July 1901- November 1903	1901-1904	Covers requisitions	1 volume	20537

**optional extra detail if you have time! Remember not to use carriage return key*

Hull History Centre – indexing guidance

\\Hcc-259\shared\History Centre General\WW2 Project\01 Volunteers\Guidelines\C TYR_4 Inputting
Fire Guard section updated.doc

Reference no: C TYR/4/

Date: This field must be filled in, use the **date of enrolment**. If there is no date of enrolment, ask a member of staff what to use.

Format is in the form D or DD MMM YYYY, with the month being abbreviated to 3 letters.
e.g. **20 Nov 1975** or **1 Mar 1942**

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Description:

Name: [first, middle, surname]

[Where a woman has had her married name added, put both as per the example: Marjorie Ward,
nec Marjorie Scott]

Year of birth: [YYYY]

Home address: [please also note any previous addresses and indicate that these have been crossed
out by putting [crossed out] including the square brackets

Place of work:

Occupation:

Date of enrolment:

Number of cards:

If there is no information for one of the fields in the description, please put [blank] including the
square brackets

Occasionally there may be a second name on the card, crossed out or otherwise, that may also need
recording. Please check with one of the staff on how to proceed.

When the record is completed, click this button in the upper right hand corner 

Then click Record on the left, then clone. Click OK on the dialogue box that comes up.

This will bring up a new record with the same information as the previous record which will save you
having to input the description titles again. You will need to put in the next reference number and change
the date and the information in the description.

These documents are unique archives so please handle them carefully.

PLEASE NOTE if there is no
enrolment date on the card,
please put c.1939-1945 in the
date field and put in the
description after Enrolment
Date: [blank]

C DSTR template

Reference no.: C DSTR/72/1
Title: Muster Roll: [name of ship]
Example: *Muster Roll: Thomas & Mary*
Extent: 1 piece
Date:
Example: 19 Jan 2017

Day, month year. Usual 3 letter format for the year;

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Description:

Include the following information:

Port of Arrival: *Goole*
Shipmaster's Name: *Geo. Shooter*
Crewmen's Names: *G. Tree; T. Shooter*

When the record is completed, click this button in the upper right hand corner



This will save and refresh the screen.

OR

Click the Ref_No button to save, refresh and put the references in order:

Ref_No

Then click the 'Record' button on the left hand-side of the screen, and then 'clone'.
Click 'OK' on the dialogue box that comes up.

This will bring up a new record with the same information as the previous record.
Edit this with the information you find on the new document, and remember to
include the reference of the item too.

The writing may sometimes be difficult to decipher, so feel free to ask staff at the
desk in the Searchroom for help. We may not always be able to make out a word but
may be able to have an educated guess, in such cases write the guess within square
brackets, ie. Tony [Wood].

3.7 Use an archivist for preparation work

Key advice

Large and complex collections may require an archivist to work on the collections first – to sort, arrange and do initial cataloguing. The volunteers then do more detailed listing of items or series with professional support.

Practical examples

- [Stoke-on-Trent City Archives](#) - for the Minton Archives and Queen's Royal Lancers projects external funding allowed for an Archivist to spend time arranging the collections and some basic cataloguing. The Lancers volunteers then undertook more detailed cataloguing. The initial work by the Archivist made the volunteer work much easier to manage. If an Archivist has not been used to sort the collection and create a basic catalogue initially then the project management and quality control is more challenging.
- [The Huntley Archives at London Metropolitan Archives](#) - the first deposit of the collection was made in 2005. It was a complex and large collection containing the documents of different campaigns and organisations. The collection needed arranging and sorting. Initially an Archivist worked closely with the depositors and staff members to arrange the collection and a catalogue assistant sorted and catalogued the main series and catalogue the main series. Volunteers have then worked on large series of photographs, stand-alone published printed books, pamphlets and periodicals.
- [Gloucestershire Archives](#) - a freelance archivist was employed in two externally funded projects to sort and arrange large business archive collections first and support the volunteers.

Further information

Examples of catalogues:

- London Metropolitan Archives [Online catalogue](#) - use the LMA/4462 or LMA/4463 references for the Huntley Archive.
- Stoke-on-Trent City Archives - [The Minton Archive](#)
- Stoke-on-Trent City Archives - [The Michelin Archive](#)



Listers records in storage at the factory (Courtesy of Gloucestershire Archives)



Made in Greater Manchester cataloguing training for volunteers – 2016 (Courtesy of Made in Greater Manchester)

3.8 (Don't just) box list

Key advice

Box listing has its place: using an archivist to arrange and sort a collection is not always possible. Collections that are not complex will be suitable for box listing. It is simple and quick for volunteers to do but it will not be suitable for every collection; and you should include something in your cataloguing policies or procedures that explains when it is appropriate to box list.

Box listing is a traditional approach to engaging volunteers with cataloguing but as is clear from the case studies presented here, there are many other options. Will box listing harness the full expertise and creativity of your volunteers? Will it produce the right sort of cataloguing for your needs? Make sure you have considered a range of approaches before reaching for the 'tried and tested' solution.

Practical examples

- [Gloucestershire Archives](#) – one way Gloucestershire Archives has sought to reduce the cataloguing backlog is to use trained volunteers to box list collections. Several groups have listed large collections in this way – typically building control files, architects plans and solicitors' archives. The majority of this cataloguing is being done to assist research for the new Victoria County History.
- [Wigan Archives and Local Studies](#) – the archive has taken a strategic approach to reducing its cataloguing backlog. It identified cataloguing priorities by using the Logjam methodology⁵. It also prioritised collections that were useful for family historians. Most of their uncatalogued collections were not complex and did not need arrangement. A box listing approach is used for these collections. A couple of collections that are slightly more complex have been arranged by an Archivist before the volunteers catalogued items in a series.
- [Made in Greater Manchester](#) - most of the services used the volunteers to box list. In some cases, a hierarchy was created by the Archivist. Their cataloguing standard includes guidance on when to box list or when to do more detailed description. They also shared professional Archivist support across the partnership.

⁵ Logjam – an audit of uncatalogued collections in the North West (The North West Museums, Libraries and Archives Council, 2004) - <http://www.nationalarchives.gov.uk/documents/archives/Logjamfullreport.pdf>

Practical example

MIGM Box Listing Master Copy2 [Read-Only] [Compatibility Mode] - Excel

Kevin Bolton

File Home Insert Page Layout Formulas Data Review View Nitro Pro ACROBAT Tell me what you want to do Share

H3 27/03/1954

	A	B	C	D	E	F	G	H	I	J
	Object Type	AssParentObjectRef.	TitAccessionNo	EADComponentLevel	TitAccessionNo	TitMainTitle	PhyDescription	CreDateCreated	CreEarliestDate	CreLatestDate
1	Name of Collection [Mandatory]	Object Type	Parent Reference Code	Level [Mandatory]	Reference Code / Item Number [Mandatory]	Title [Mandatory]	Description [Optional]	Date / Covering Dates [Mandatory]	Date Earliest [Mandatory]	Date Latest [Mandatory]
2	Walker Brothers	Archive	D/DY/PAG/4	Item	D/DY/PAG/4/1	Arrangement of 'Walker' Patent Inertia Overwind Prevention Gear Fitted with Slow Brake Attachment, 033609	1. Purchaser: N.C.B. S.W. Divn No. 5 Area, Llanbradach Colly No. 1. Pit 2. Drawn by: JSW 3. Scale: 3/4" to 1 Foot 4. Order Number(s): 52191 & 52629. J. 7097 5. Any other information: For arrangement and detail of 'Fail to Safety Gear' for Brake Engine, refer to Drgs 033474 & 033479	27 Mar 1954		1954
3	Walker Brothers	Archive	D/DY/PAG/4	Item	D/DY/PAG/4/2	Details of Drive for Overwind Prevention Gear, 033634	1. Purchaser: N.C.B. Scot. Divn, Fife Area, Bowhill No 2 Pit 2. Drawn by: RW 3. Scale: 3" to 1 Foot 4. Order Number(s): J5965 5. Any other information: An original pencil drawing	19 Nov 1953		1953
4	Walker Brothers	Archive	D/DY/PAG/4	Item	D/DY/PAG/4/3	Arrangement of 'Walker' Patent Inertia Overwind Prevention Gear - With Hydraulic Operation and Steam Release Gear, 033635/1	1. Purchaser: N.C.B. Scot. Divn, West Fife Area, Bowhill Colly No 1 Pit 2. Drawn by: JSW 3. Scale: 3/4" to 1 Foot 4. Order Number(s): J.5964, 51865, 51872, J.8456 5. Any other information:	27 Apr 1954		1954
5	Walker Brothers	Archive	D/DY/PAG/4	Item	D/DY/PAG/4/4	Arrangement of Pipes for Hydraulic Operating Gear, 033635	1. Purchaser: N.C.B. Scot. Divn, Fife Area, Bowhill No 1 Pit 2. Drawn by: RSW 3. Scale: 3/4" to 1 Foot	21 Nov 1953		1953

MIGM Cat.Temp.Overview **MIGM Cat.Temp.Detail** MIGM Cat. Notes

Ready 85%

Guidance

Copy of MIGM Box Listing Template 2016 - JR [Read-Only] [Compatibility Mode] - Excel

Kevin Bolton

File Home Insert Page Layout Formulas Data Review View Nitro Pro ACROBAT Tell me what you want to do

A7 Description

	A	B	C
1	<p>Please find below a worked example of data, based upon the GM Cataloguing Standard. In all cases, the GM Standard should be used where possible to allow for integration of data into GM Lives. In case of any queries, please contact the Lead Officer.</p>		
2	Field	Example	Notes
3	Name of Collection [Mandatory]	Walker Brothers (Wigan) Limited	Ensure all uses of the name of the business/collection are standardised and consistent throughout the catalogue information
4	Level [Mandatory]	Series	Only the following levels should be used: Collection; Sections; Series; Sub-series; File; Item
5	Reference Code / Item Number [Mandatory]	D/DY/PAG/A1	Keep numbers simple and clear; where simple box listing is being done, this may result in a large run of sequential numbers being generated, so consider breaking these up into artificial sections, eg. PAG/A1-A100; PAG/B1-B100
6	Title [Mandatory]	Mining equipment, order books	Brief title of archive at Collections Level; at lower levels this field can be used to record a brief description of the individual record or record series.
7	Description [Optional]	Order books maintained by Walker Brothers subsidiary companies, listing orders completed for mine ventilation equipment. Original order numbers covered by the volumes are W101-W2367.	Additional description can be provided to give further information concerning the series or items.
8	Date / Covering Dates [Mandatory]	1 May 1900-12 Jun 1098	Please see dating conventions in the GM Cataloguing Standard If cataloguing into excel, please remember to change format of the text box to "Text" to prevent auto correction by the programme
9	Date Earliest	1900	This is to record the earliest date of an item and needs to be a year date only Please see dating conventions in the GM Cataloguing Standard If cataloguing into excel, please remember to change format of the text box to "Text" to prevent auto correction by the programme
10	Date Latest	1908	This is to record the latest date of an item and needs to be a year date only Please see dating conventions in the GM Cataloguing Standard If cataloguing into excel, please remember to change format of the text box to "Text" to prevent auto correction by the programme
11	Extent [Mandatory]	1 volume	Terms to be used: <ul style="list-style-type: none"> • 1 piece (only to be used for individual pages within a volume) • 1 item (could be a single document, photograph, booklet) • 1 CD • 1 volume • 1 file • 1 bundle • 1 archive box (large) • 1 archive box (small) • 1 shelf • 1 bay

3.9 Think creatively about space

Key advice

Some services have volunteers working in the search room. This makes supervision easier as there is always a member of staff available to help with any questions. It also creates a vibrant and social environment in the search room. Other services use a separate space or room for volunteers to do collections work in to avoid tension with other readers and the need or preference for quiet? Certain days will be put aside for volunteer projects which makes allocating staff resource easier.

Practical examples

- [Wigan Archives and Local Studies](#) currently have volunteers working in their small search room. As part of their [Regenerating Wigan Archives](#) project they hope to create a new spaces for volunteers adjacent to the search room. Volunteers working on collections want a space near the search room, but separate so they can chat easily.
- Gloucestershire's "[For the Record](#)" project is also looking at creating a flexible space adjacent to their search room for volunteers and groups working on collections.
- [Stoke-on-Trent City Archives](#) – some volunteer groups work in the search room (when it is closed to the public). Other groups use a library ICT room.



Volunteers at Wigan Archives (Courtesy of Wigan Archives)

3.10 Use a group approach

Key advice

Creating groups of volunteers for specific projects makes supervision easier. Use certain volunteers as group co-ordinators who can assist with support and quality control. Provide these volunteers with additional training in cataloguing and collection management systems. Alternatively work in partnership with other archive services, friends groups, family history societies or universities to help with volunteer support.

Practical examples

- [Wigan Archives and Local Studies](#) – staff capacity to support the volunteers can be a challenge. They used to have lots of different volunteers working on their own projects. However, the service has moved to a project or group approach. They have 3-4 projects running at one time. Volunteers are assigned to each project. This works better than having lots of separate projects. Some of their volunteers like variety and may work on more than one project.
- [Stoke-on-Trent City Archives](#) – they use a group approach which works well, where each group has a 'super volunteer' who acts as a group co-ordinator. They will receive extra training from the archives staff in cataloguing and using the collections management system. They will help with the volunteer questions, supervision, enhancing catalogue entries with data taken from volunteer spreadsheets and quality control. This system was piloted successfully with the Lancers group and will be a model for future practice.
- [Staffordshire Record Office](#) - are working in collaboration with the University of Keele, University of Nottingham and University of Liverpool on AHRC funded research projects which will use volunteers. University staff assist with the group volunteer co-ordination.
- [London Metropolitan Archives \(LMA\)](#) - the project attracts a different demographic of volunteers to LMA. Many have been young, students or from the Black African Caribbean community. Recruitment was often done through the Friends of Huntley Archives at LMA (FHALMA) and through the annual Huntley Conference which began in 2006.

3.11 Build in quality control

Key advice

There is a balance to reach over the amount of staff time you invest in quality control and trusting the work of the volunteers. Proper planning and input from collections management staff helps reduce the amount of quality control work required e.g. training, documentation (see sections 3.5 and 3.6). Volunteers feel despondent when their work does not appear online promptly so use volunteers to quality control each other's work and speed up the process?

Practical examples

- [London Metropolitan Archives](#) - each catalogue is printed and checked by an Archivist. They will annotate the catalogue with any edits and the volunteer then makes the changes on the electronic version. The Archivist will talk the volunteer through the changes which helps with their learning.
- [Staffordshire Record Office](#) - in the Quarter Sessions project the volunteers quality check each other's work. For all projects the 'perfect approach' has the Archivist doing a final quality control check before it is made live on the online catalogue.
- [Heritage Heroes](#) - quality control is undertaken when the data was copied from the crowdsourcing platform into the collection management system. However, there was a fine balance between quality control and trusting the volunteers.



University of St. Mark and St. John (Marjon) Volunteers - 2014

Further information

Stoke-on-Trent City Archives – screen shot from collection management system

Shows an enhanced catalogue entry after it has been updated by the Volunteer Co-ordinator and passed as completed 'GATEWAY READY' and is now ready for the Archivist to quality control.

The screenshot displays the Calm Catalogue Management System interface. On the left is a navigation tree for '16th/5th The Queen's Royal Lancers Archive Collection'. The main area shows a list of records, with the selected record expanded to show details. The record is identified as 'O18/3/6c/2/1' and is located at 'Stoke on Trent City Archives'. The description states: 'Copy of Programme for the Army Cup Final (football) 1958-1959 season: 16th/5th The Queen's Royal Lancers (Catterick) versus 1st Battalion The Royal Scots (The Royal Regiment) (B.O.A.R)'. The record is currently in 'Draft' status and is marked as 'GATEWAY READY'. The interface includes a menu bar, a search bar, and various tabs for 'Catalogue', 'Accession', 'Conservation', and 'Loans'.

Level	Ref_No	Previous_Numbers	Extent	Title	Description	Text
Item	O18/4/3/3/1/5	SD 1734/Box 11/12	[Box 1945-19: 2 items	16th/5th The Queen's Lancers (Oli	Two menus of the Alival Dinner D	Volunteer Task: suitable for digitisation. GATEWAY READY
Item	O18/4/3/3/2/4	SD 1734/Box 11/13	[Box 1945-19: 2 items	16th/5th The Queen's Lancers (Oli 1)	Menu for the Old Comrades A	Volunteer Task: List each item in the Description Field, location etc. Menu suitabl
Item	O18/3/14b/13/5	SD 1734/Box 11/14	[Box 1945-19: 1 envelope	Photographs of Catterick and Proc 1)	Black and white photograph of	Volunteer Task: List each item in the Description Field, suitable for digitisation. G
Item	O18/3/18/3/1	SD 1734/Box 11/15	[Box 1945-19: 1 envelope	Programme of The Queen's visit to	1). Four copies of the programme	Volunteer Task: List each item in the Description Field, suitable for digitisation. G
Item	O18/3/2/12/2	SD 1734/Box 11/16	[Box 1945-19: 1 item	Illuminated address from King Gec	Illuminated address from King Gec	Volunteer Task: Generally describe or transcribe in the Description Field, worthy c
Item	O18/3/6c/2/1	SD 1734/Box 11/17	[Box 1945-19: 1 item	Copy of Programme for the Army Cup	Final (football) 1958-1959 season: 16th/5th The Queen's Royal Lancers (Catterick) versus 1st Battalion The Royal Scots (The Royal Regiment) (B.O.A.R)	Volunteer Task: Add the rest of the details to the Description Field, suitable for dig
Item	O18/3/2/1/1	SD 1734/Box 11/18	[Box 1945-19: 1 envelope	Programme of the Vienna Search(1).	A covering note from G.W.H. F	Volunteer Task: Number and identify each item in the Description Field, alter date
Item	O18/3/2/6/4	SD 1734/Box 11/19	[Box 1945-19: 1 item	Diary of the destruction of Germar.	The diary does not mention the 1	Volunteer Task: Explain what this is and summarise in the Description Field, suit
Item	O18/3/14b/12/6	SD 1734/Box 11/20	[Box 1945-19: 1 item	Photocopies of 2 photographs of tl 1).	A copy of two black and white	Volunteer Task: Number the items and describe in the Description Field, suitable
Item	O18/4/3/2/1	SD 1734/Box 11/21	[Box 1945-19: 1 item	16th/5th Lancers Association Non A	Book of 16th/5th Lancers Assoc	Volunteer Task: See if you can find any dates later than 1951, we have no idea of
Item	O18/3/5/3/1/1	SD 1734/Box 11/22	[Box 1945-15: 1 item	16th/5th Lancers 2nd Troop Diary	A diary written by Officers of 2nd	Volunteer Task: Number items and describe in Description Field, Explain what th
Item	O18/3/14b/13/1	SD 1734/Box 11/23	[Box 1945-15: 1 envelope	Regimental newsletter and excerpt 1).	Excerpts from the Adjutant's di	Volunteer Task: Number items and describe in Description Field, can you identify
Item	O18/3/2/3/2/1	SD 1734/Box 11/24	[Box 1945-15: 1 item	Report of incident at a displaced p	This is an account of Trooper J. R	Volunteer Task: Describe this item in the Description Field, possible transcription

IDENTITY

Level: LocatedAt:

Ref_No:

DocRefNo:

Previous_Numbers:

AccNo:

Extent:

Title:

Date:

CONTENT

Description:

ACCESS

Access_Status:

ALLIED_MATERIALS

CatalogueStatus:

Text:

AccessionData

Acc_No: Ref_No:

Title:

4. Detailed Case Studies

4.1 Gloucestershire Archives

About the projects

The **Fielding and Platt Community Archive Project** was funded by the Heritage Lottery Fund in 2013 and aimed to gather, catalogue, preserve, share, and celebrate the heritage of Fielding and Platt, a pioneering engineering firm in Gloucester from 1866–2003. One strand of the project was to catalogue this large and complex collection using an archivist and volunteers. Gloucestershire Archives was awarded £2,000 in 2014 from the Business Archives Council to fund the cataloguing of a significant engineering archive, **Listers of Dursley**.

Both projects used a similar approach to the cataloguing – an archivist was employed to sort the collection and create a catalogue structure for the collection. The volunteers were then trained and supported to undertake more detailed listing of specific items.

Key lesson

An archivist was employed in both projects to sort and arrange the collection first. The volunteers were then used to undertake more detailed listing of specific items with professional support.

What worked well?

- **Knowledge and expertise** - the Fielding and Platt catalogue has benefitted from the expertise the volunteers brought: a former senior manager with the firm advised on the codes and numbering systems used by the firm; a retired engineer and a draughtsman helped to make sense of technical records; and the firm's photographer explained how Fielding's promoted its products.

"I've had 40 years service with the company and therefore most of the records at the archives have passed through my hands at some stage or another. I felt that my skill would be assisting in the correct interpretation of the records" Project Volunteer

- **Professional input** – A freelance archivist was employed in both projects to sort and arrange the collection first and support the volunteers.
- **Enthusiasm** - key to the success of the projects was the enthusiasm and commitment of the volunteers.
- **Training and documentation** – volunteers were provided with training by Archives staff in cataloguing and packaging. Good guides and templates were created to help support the volunteers.

- **Advocacy** – the project volunteers act as 'ambassadors' for the projects and Gloucestershire Archives. They help promote the service to people who may have been otherwise unaware. They also alert the Archives when they hear about local records at risk from destruction or dispersal, as in the case of Listers.
- **Partnerships** – the projects have led to the Archives developing stronger relationships with community groups and local organisations.

What were the challenges?

- **Space** – the volunteers were based in the search room, sharing space with other visitors. A table for the group was reserved but they really needed a separate room for them to be able to spread out and chat comfortably.
- **Supervision** - volunteers have fed back that they appreciate regular contact - they feel valued and it avoids them feeling they are working in isolation.
- **Staff capacity** - There are challenges with staff capacity to deal with the output from volunteer cataloguing projects and import the data onto their collections management system. Volunteers can feel despondent when their work does not appear online promptly. This is particularly true where smaller projects have not had proper quality control or have developed without guidance from collections management staff.
- **Conservation** – the Lister archives had been kept in damp and mouldy conditions at the factory and needed cleaning carefully before cataloguing. However, volunteers also assisted with the cleaning and packaging with training and support from the conservator.

Legacy and future plans

Another way Gloucestershire Archives has sought to reduce the cataloguing backlog is to use trained volunteers to **box list collections**. Several groups have listed large collections in this way – typically building control files, architects plans and solicitors' archives. The majority of this cataloguing is being done to assist research for the new Victoria County History. The Archives has also started to use certain volunteers as co-ordinators who can assist with supervision and quality control.

"They don't provide all the contextual description and arrangement that a cataloguing archivist would have created, but they do at least provide enough detail to give access for research." Julie Courtenay - Collections Leader

The "For the Record" project will develop facilities and capacity for looking after the historic county of Gloucestershire's documented history. As part of the project Gloucestershire Archives is creating a Heritage Hub where it will deliver training and provide space for volunteer groups and community archives. As Gloucestershire Archives moves towards the Heritage Hub, its staff have reviewed their experiences to date of

working with volunteers. These discussions have helped shape the creation of a new Volunteering Handbook.

Further information

- [For the Record](#)
- [Fielding and Platt History](#)
- [Report on the Listers cataloguing project](#)

4.2 Made in Greater Manchester

About the project

The Greater Manchester Archives and Local Studies Partnership provides an over-arching strategy and development plan for the ten local authority archive and local studies services in Greater Manchester. In 2016, the partnership secured funding from the Heritage Lottery Fund for the Made in Greater Manchester project to raise awareness of industrial and business archives. Over 50 volunteers have played a key role undertaking cataloguing, research and digitisation of uncatalogued business collections.

Key lesson

There are significant benefits to be gained for archive services to collaborate on volunteer management, cataloguing and service improvement. For example, by developing joint training, rewards, documentation and sharing support.

What worked well?

- **Cataloguing** – this was the easiest part of the project. The collections were large and sometimes complex, but the project over achieved on its cataloguing targets. Over 2,000 catalogue entries were created by the volunteers.

“These collections would never have been catalogued without volunteers.”
Becky Farmer, Project Archivist
- **Training** – training was delivered to the volunteers on cataloguing, digitisation and blogging. Feedback from the volunteers on the training was very positive. Services without an Archivist also sent staff to attend the cataloguing training.
- **Rewards** – the partnership has developed an annual Volunteer Awards event where the work of archive volunteers in Greater Manchester is recognised and rewarded.
- **Strong documentation** – cataloguing guidance and templates were created for the volunteers.
- **Flexibility** – most of the services used the volunteers to box list. In some cases, a hierarchy was created by the Archivist. This approach made it easier for those services with no professional Archivist. The GMALSP cataloguing standard includes guidance on when to box list or when to do more detailed description.
- **Sharing support** – the Project Archivist gave professional and practical support to some services who had limited staff capacity. In some cases, an Archivist from another authority gave professional support. One service hosted the volunteers from another service as they had issues with space. It was useful to have staff on hand to help with some of the more complex records e.g. plans or technical drawings

- **Quality control** – the Project Archivist and archives staff proof read and checked the catalogues. However, the quality of the catalogues was generally very high. The Archivists retained editorial control of the catalogues.
- **Expertise** – some services used volunteers with a particular expertise to help interpret and catalogue the collection. For example, retired engineers were used at Wigan Archives to catalogue engineering plans. Generally, the volunteers showed huge enthusiasm and passion for the project and the collections.
- **Creativity** – there were other creative outputs from the project. Blogs were created by the volunteers. Young people at Oldham used the archives as inspiration to create a piece of theatre.
- **Corporate volunteering** – one service developed a relationship with a local business and created volunteering opportunities for their staff on the project.

What were the challenges?

- **Recruitment** – recruitment of the volunteers took longer than expected for some services. One service struggled to recruit any volunteers and did not participate in the project. Some services did not have volunteer policies or procedures in place.
- **Online catalogue** – there were technical issues with the software for uploading the completed catalogues onto the online catalogue.
- **Capacity** – some services had limited capacity or no professional Archivist. Others struggled with space.
- **Confidence** – some volunteers found cataloguing such large collections daunting to start with. However, the training and staff support helped them develop skills and gain confidence. In future, the cataloguing training could be made a little longer to give more hands-on experience.
- **Collection prioritisation** – some services used Logjam results (2002) to prioritise which collections were part of the project. This was a useful tool, but in future services may wish to put a stronger emphasis on the impact the collection will have on their local community.

Legacy and future plans

The partnership has developed a Service Plan for 2017-2020. A key priority is to build on the partnership's significant achievements by increasing, in scale and diversity, the opportunities for people to engage in volunteer programmes. This includes creating an annual volunteer training programme and developing a volunteer toolkit / framework of best practice.

Further information

- [Made in Greater Manchester blog](#)
- [Unboxing Oldham – Archives Inspiring Theatre](#)

4.3 Connected Catalogue – University of St. Mark and St. John (Marjon)

About the project

Marjon's archives date back to 1840, and the dawn of formal teacher training, and comprise documents, images and artefacts from its two constituent colleges of St Mark's in Chelsea and St John's in Battersea.

Since 2011 the Connected Catalogue project has been improving the employment opportunities and life skills of the long term unemployed and people with disabilities in Plymouth. The volunteers work at the archive to help catalogue, explore new ways of cataloguing collections, curate displays and exhibitions.

Key lesson

Archive catalogues can sometimes be difficult to use and a barrier to new audiences. Volunteers bring a different perspective and voice to cataloguing and indexing.

What worked well?

- **New ways of cataloguing** - the volunteers have had input into cataloguing and creating finding aids, which will positively affect future users by offering an accessible alternative to the professionally created standard. They evaluate how and why people search, what new search terms and tools might mean to the archive sector and how they can be placed to adapt and respond.
- **Trust and respect** – each volunteer is encouraged to choose a topic from the archives that they are interested in or passionate about. They then design a small project with a planned output. They then find a way to share the information with an audience and create a way for future audiences to find the material again – thinking about search terms and their relevance – 'who in the future might want to know?'.

"Don't just think about what you want from volunteers – concentrate on what skills, knowledge and experience they bring and utilise them. It's a huge resource."
Gillian Fewings, University of St Mark and St John

- **Training** – the emphasis of training is on 'why' we archive, not necessarily 'how'. However, as part of the project each volunteer is given basic training in handling material, Data Protection, copyright and Freedom of Information. Project management 'workshops' have been ongoing - to encourage usable workplace and life skills. External training offered has included a Wiki Edit-a-thon and family history.
- **New audiences** - People who have not previously engaged with archives have an opportunity to engage on a meaningful level.

- **Skills and confidence** – the volunteers have gained valuable work and life skills such as project management and communication skills, increased confidence and self-esteem. Two of the volunteers have gone on to start businesses, 17 of the original 29 have gone on to offers of job interviews, to begin other social enterprise ventures and find paid employment.
- **Advocacy** – the profile of the archive has increased with the University and use of the archive has increased.
- **Partnerships** – volunteers are recruited with the help of the Plymouth Volunteer Guild, some via the supported volunteering scheme “Avenues” – designed to help people with mental health issues to move towards employment

What were the challenges?

- **Funding** - a budget would be useful – but a huge amount has been achieved with no funding.
- **Space** – the volunteers work in the collections room, but space can be a challenge. Class rooms on campus can be booked for training sessions.
- **Partnerships** - working with outside agencies and trying to understand each other’s purpose and motivation takes time but is essential to get right from the beginning.
- **Staff capacity** - running multiple projects needs more organisation, energy and planning than you might imagine.

Legacy and future plans

A team of seven volunteers continue to work on the project. One of the volunteers is developing an archives collections management system for small services and community archives using a Raspberry Pi.

Further information

- DCDC16, [The Connected Catalogue Project](#) - Gillian Fewings, University of St Mark and St John

4.4 London Metropolitan Archives – The Huntley Archives

About the project

The Huntley archives were the first major deposit of records from the African-Caribbean community in London presented to London Metropolitan Archives. The papers consist of the business records of Bogle-L'Ouverture Publications Limited and documents concerning personal, campaigning and education initiatives of Eric and Jessica Huntley, dating from 1940s-present. A team of volunteers have been cataloguing the photographs, reference books and periodicals in the collection with global relevance to the Black African Caribbean diaspora.

Key lesson

Large series of photographs and stand-alone published printed books, pamphlets and periodicals can make good volunteer cataloguing projects.

What worked well?

- **Arrangement and sorting** - the first deposit of the collection was made in 2005. It was a complex and large collection containing the documents of different campaigns and organisations. The collection needed arranging and sorting. Initially an Archivist worked closely with the depositors and staff members to arrange the collection and a catalogue assistant sorted and catalogued the main series.
- **Knowledge** – a large collection of photographs was unsorted and often not labelled. This made identifying campaigns and individuals very difficult. The Archivist worked with the Huntleys and their friends to identify photographs. A small team of 1-2 volunteers then started to sort, catalogue and package the collections. They slowly built up excellent recognition of individuals. They could also refer to published sources including administrative histories already written in the catalogue to the organisations, campaigns and events in question which made cataloguing and sorting with regular Archivist review easier. Templates and instructions assisted them with the cataloguing under each relevant section in the existing structure.
- **Book cataloguing** – a collection of over 5000 published books and periodicals that belonged to Eric and Jessica Huntley were catalogued by a second team of 4 volunteers. Some of the volumes are very rare. Little arrangement was required which made the task easier for volunteers. A cataloguing template was created by colleagues in the Guildhall Library. This is treated as a special collection to demonstrate what Eric and Jessica Huntley referred to/sold in their bookshop for addition to the City of London's Library Catalogue.
- **Recruitment** – the project has attracted a different demographic of volunteers to LMA. Many have been young, students or from the Black African Caribbean community. Recruitment was often done through the Friends of Huntley Archives at LMA (FHALMA) and the annual Huntley Conference since 2006.

- **Induction** – some of the volunteers who have been there for longer help new volunteers with induction and training. Volunteers at LMA are given document handling inductions.
- **Quality control** – each catalogue is printed and checked by an Archivist. They will annotate the catalogue with any edits and the volunteer then makes the changes on the electronic version. The Archivist will talk the volunteer through the changes which helps with their learning.

What were the challenges?

- **Arrangement**– the complex and large nature of the collection meant it did need an Archivist to sort, arrange and catalogue the main set of documents. The Archivist also did a first sort of photographs to establish an initial order which was later fine-tuned and further stray items inevitably had to be added later.
- **Library or archive?** The Archivist had to make decision about whether a printed item should be part of the archive or library collection. If a book was heavily annotated or created by Bogle-L'Ouverture Publications Limited or another organisation established by Eric and Jessica Huntley they would keep it in the archive collection. For example a Post Office staff newsletter from 1960s was found to contain an article by Eric Huntley as he worked at the Post Office and was therefore moved to the archive.
- **Language** – a small proportion of the books and periodicals are written in Jamaican Patois or Arabic.
- **Condition** – some items were subject to poor storage prior to transfer. For health and safety reasons, volunteers have been provided with protective gloves (and masks where appropriate) in case of any allergies. Volunteers having received document handling training were instructed to identify items requiring future conservation.

Legacy and future plans

The Friends of Huntley Archives at LMA (FHALMA) received a grant from the Heritage Lottery Fund for the No Colour Bar - Black British Art in Action 1960 -1990 project which developed an exhibition looking at Black contributions to British 20th century culture. This project involved digitisation and exhibition of photographs in the collection. Descriptions to photographs will be updated to the online catalogue in Summer 2017 and the Huntley Library book and periodical spreadsheets made available during 2018.

Chubb Collectanea Scrapbooks

A similar approach has been taken with the archives of Chubb and Son Limited, lock and safe makers. An Archivist arranged and catalogued the key series of records including scrapbooks. A team of volunteers have used a template to catalogue to item level 73 out of 110 scrapbooks called the 'Chubb Collectanea' covering the period 1819-1964. They contain press cuttings, articles, original documents including letters and testimonials from

customers, photographs, sketches and drawings, brochures, handbills, price lists and a wealth of other printed material relating to the company and history of security thinking and practice dating from 1819 to 1987. Scrapbooks can provide excellent opportunities for volunteers in adding value to existing catalogue descriptions. Each item is given its own description at item level. The wealth of documents contained within the books and items being fixed in pages which would not require sorting meant that they were prime candidates for listing to item level.

Further information

- [Huntleys Online](#)
- [Huntley Archives \(LMA\)](#)
- [Black Caribbean Community Archives at LMA](#)
- [Online catalogue](#) use the LMA/4462 or LMA/4463 references
- [Burglars beware - unlocking the history of Chubb](#)

4.5 University of Aberdeen Special Collections

About the archive

The University of Aberdeen Special Collections Centre is home to the University's historic collections of books, manuscripts, archives and photographs. The collections comprise over 230,000 rare printed books as well as 5,000 archival collections, with material dating as far back as the 3rd century BC. The collections cover all aspects of the history and culture of the University, the City of Aberdeen, the region and the relationship they enjoy with the wider world. The service has had a long-established volunteer programme using a mixture of local retired people and students to undertake cataloguing of the archive collections.

Key lesson

The expertise, skills and local knowledge that volunteers bring can help create high quality catalogues.

What worked well?

- **Expertise** – the volunteers bring a wide range of skills to the cataloguing. One volunteer is multilingual and catalogues the medieval and estate collections. A former engineer helps catalogue the business records and plans. A rare book volunteer has catalogued the Hebrew collections.
- **Local knowledge** – the local volunteers bring local knowledge of the area that the archives staff may not have. This is particularly important for cataloguing and interpreting the estate collections. Some volunteers are ex alumni or staff and have good knowledge of the history of the University.
- **Organised schemes** – more recently the service has benefitted from placements from Robert Gordon University's Information and Library Studies MSc course, conservators currently studying at institutions across Europe and the University's own student placement scheme. These types of placements produce high quality work.
- **Arrangement** – some of their long-standing volunteers can produce draft arrangements of complex collections themselves. The Archivist might tweak these arrangements. In other cases, the Archivist will create the arrangement and the volunteers will catalogue the section or series.
- **Reduced cataloguing backlog** – without the volunteers a lot of the collections would have remained uncatalogued. Some volunteers assist with accessioning (box listing) or location lists. They have also retro-converted much of the archives' paper lists onto their collections management system.
- **Documentation** – there is a good archives cataloguing manual for staff and volunteers that helps ensure the quality of the catalogue are high.

- **Rare books** – the rare books are largely catalogued, but more recently volunteers are going through the provenance registers and helping record additional information on the library catalogue.

What were the challenges?

- **Quality** – the quality of the catalogues and work is very important to the service. They try and use volunteers who bring expertise, local knowledge and can produce high quality work. In the past volunteers have sometimes produced work that does not meet the required standards.
- **Students** – students do not always possess the local knowledge and often want a short-term placement. The service has a long waiting list of students interested in volunteering. The service tends to prioritise fourth years and postgraduate students - especially those who are interested in a career in archives or heritage.
- **Confidentiality and security** – some cataloguing work may require the volunteers to work in the stores. However, the service has had to put measures in place to control and manage this. Especially since they have acquired NHS records.
- **ICT skills** – using a PC can be a challenge for some volunteers. Others have developed their ICT skills because of their volunteering.
- **Capacity** – staff time and pressures means that managing and supervising the volunteers can be challenging.
- **Making it look too easy** – a staff resource is still required to manage the volunteers and undertake key duties.

Legacy and future plans

The success of the archive volunteers has led to the rare books and conservation teams using volunteers more. The conservation volunteers do box making or cleaning.

Further information

- [Volunteering opportunities and policies](#)
- Papers of the Earls of Kintore (catalogued by a volunteer) - [MS 3064](#)

4.6 Marks & Spencer Company Archive

About the archive

To celebrate the 100th birthday of Marks & Spencer in 1984, the Company took the opportunity to look back with pride at its long history. They decided to collect together the many historical items from all over the Company and create the Marks & Spencer Company Archive.

Since then, the archive team has worked to collect, catalogue and make available for use, all kinds of records of Marks & Spencer's past. Today the archive contains more than 71,000 items covering more than 130 years, and we welcome new additions to our collection.

The Marks & Spencer Company Archive moved to a new, purpose-built repository at the Michael Marks Building on the campus of the University of Leeds in 2012. It is home to the free Marks in Time exhibition as well as Schools and Community programmes. This includes volunteer opportunities to undertake cataloguing, digitisation and help with events.

Key lesson

A volunteering programme can be an excellent way to engage with the local community and universities.

What worked well?

- **Recruitment** – there are currently 11 volunteers. They are mostly retired local people or University of Leeds students (current and former), as well as young people seeking archives experience. Some volunteers are Marks & Spencer customers who were attracted to the brand.
- **Garment collection** – these objects are simply arranged and relatively easy for the volunteers to catalogue. They can provide a detailed level of description that an Archivist would never have the time to do. They also photograph each object.
- **Knowledge** – the volunteers can bring expertise and a different perspective. For example, one volunteer is a fashion student and working on the garment collection. Another volunteer is an employee and has a good understanding of the label codes used in garments.
- **Volunteer focused** – projects are matched to the interests of the volunteer. They also try and vary the work for each volunteer so they do not lose interest.
- **Training and support** – staff time is invested at the beginning to train them in cataloguing and photography. They are also provided with contextual information about the collection.

- **Documentation** – some volunteers catalogue into Excel or Word templates. Instructions are also provided. More experienced volunteers catalogue directly into the collections management system.
- **Quality control** – the Archivist will look over each catalogue and make any changes. They will also provide feedback to volunteers.
- **Community engagement** – the volunteering programme forms part of a wider strategy to use the archive for community engagement and work in partnership with the University of Leeds.

What were the challenges?

- **ICT** – some volunteers do not have ICT skills. They undertake more detailed research on documents or objects that is then typed up into the catalogue. However, other older volunteers have developed IT skills as part of their volunteering.
- **Staff capacity** – volunteers usually come in for a half day or day each week. Hosting longer placements is more of a challenge due to staff capacity in a small team.
- **Collections management system** – spellcheck is difficult to use that can slow down the quality control process.

Legacy and future plans

Volunteers reaching the end of their university courses are likely to move on, so they may look to recruit some new volunteers from the University of Leeds in September.

Further information

The following are examples of catalogues created by volunteers:

- <https://archive-catalogue.marksandspencer.ssl.co.uk/t50.176>
- <https://archive-catalogue.marksandspencer.ssl.co.uk/t50.177>
- <https://archive-catalogue.marksandspencer.ssl.co.uk/t50.203>

4.7 Heritage Heroes

About the project

Shropshire Archives has been using volunteers for over twenty years. In 2014 Shropshire Council received Arts Council England and Renaissance Strategic Support fund to create new innovative sustainable business model for the delivery of museums, arts, archives and the visitor economy. The project included a strand to enable the development of an innovative crowdsourcing approach to enable people to volunteer to support the county's heritage collections (archives and museums). Users registered which enabled them to undertake tasks such as transcription, research collections, spell check, make general modification, sort and catalogue photographs, scan and classify documents.

Key lesson

Crowdsourcing can work well for transcription and catalogue enhancements if you pick the right type of collections.

What worked well?

- **Pick the right collections** – the project found it is important to pick the right collections and tasks as there is often more preparation work required than for onsite volunteering (particularly the digitisation). Transcription and catalogue enhancement worked well. For example, volunteers transcribed World War One diaries and early borough minute books. 48% of the volunteers undertook transcribing.
- **Training and guidance** – good guidance is essential. Shropshire developed a series of online video tutorials and written guides for volunteers. For volunteers who lived locally they delivered face to face training in libraries and the archive.
- **Volunteer base** – the project attracted volunteers from across the United Kingdom and the World. 41% of volunteers were from Shropshire (including Telford). Some of these were also onsite volunteers. 44% were from elsewhere in the United Kingdom and 14% overseas.
- **New audiences** – 48% of the volunteers had never used the museum or archives service before.
- **Skills** – some of the volunteers have outstanding Latin or palaeography skills.
- **Wiltshire and Swindon Archives** – the project included some estate records relating to Shropshire held by Wiltshire and Swindon Archives.
- **Quality control** - quality control was undertaken when the data was copied from the crowdsourcing platform into the collection management system (see below). However, there was a fine balance between quality control and trusting the volunteers.

"If you are checking in so much detail you might as well do it yourself."

Mary McKenzie, Acting Museums and Archives Manager, Shropshire Museums and Archives Team

What were the challenges?

- **Active volunteers** - 316 people registered via the website to become a virtual volunteer, however only 32 people became active volunteers. The 'leader board' for these 32 volunteers indicates that the top 10 active users uploaded 84% of the approved records
- **ICT systems** – there were some challenges with the platform. They sometimes use Dropbox as an alternative and this works well. They were unable to fully link the platform with the archives collection management system meaning staff had to cut and paste the work. However, they did manage to link the platform to their museum collection management system.
- **University engagement** – they had hoped to engage more effectively with academics and students. In future, they would involve them from the beginning of project development.
- **Capacity** – the project still generated a lot of questions from volunteers by email and phone that needed answering.

Legacy and future plans

The Heritage Heroes project is continuing. Shropshire Archives have also just launched their new web site and online catalogue. In future, they would like to embed the remote volunteering opportunities to people via this platform.

Further information

- [Heritage Heroes web site](#)
- [Instruction videos](#)

4.8 Staffordshire and Stoke-on-Trent Joint Archives Service

About the projects

The Archives Service is jointly administered and funded by Staffordshire County Council and Stoke-on-Trent City Council. Stoke-on-Trent City Archives are using three groups of volunteers to make three important collections accessible:

- 16th/5th The Queen's Royal Lancers – catalogued by former members of the Queen's Royal Lancers.
- Minton Archive – data entry and name indexing by existing volunteers, some with a specialist interest in the history of Minton and Royal Doulton.
- Michelin Archive – ex employees of the company.

Staffordshire Record Office has a long history of using volunteers. One of their longest standing projects is the cataloguing of Staffordshire Quarter Sessions rolls. Since 2009 a group of volunteers have catalogued over 450 rolls (13,000 entries) from 1650-1799. External funding allowed other Quarter Session records to be catalogued by a Project Archivist.

Key lesson

Using a group co-ordinator can help with supervision, training and quality control. In some cases this can be a 'super-volunteer'.

What worked well?

- **Group approach** – at Stoke-on-Trent the group approach works well, where each group has a 'super volunteer' who acts as a group co-ordinator. They will receive extra training from the archives staff in cataloguing and using the collections management system. They will help with the volunteer questions, supervision, enhancing catalogue entries with data taken from volunteer spreadsheets and quality control. This system was piloted successfully with the Lancers group and will be a model for future practice. At Stafford group discussion of problems (led by the volunteer coordinator) kept the group engaged over the long period of its existence.
- **Arrangement and sorting** – for the Minton Archives and Queen's Royal Lancers projects external funding allowed for an Archivist to spend time arranging the collections and some basic cataloguing. The Lancers volunteers then undertook more detailed cataloguing. The initial work by the Archivist made the volunteer work much easier to manage.
- **Learning** – an Archivist invested a lot of time at the beginning of the Staffordshire Quarter Sessions project to develop the skills of the volunteers e.g. types of documents, palaeography. Continuing support for learning is key to the project's success. The volunteers have now become very skilled in interpreting these

records. The project started with the most recent records (1799) and worked backwards which made the learning process easier.

- **Name indexing** – volunteers also name index records that are useful for family historians e.g. calendar of prisoners, apprenticeship indentures. The indexes are then added to Staffordshire Name Indexes - <https://staffsnameindexes.org.uk>.
- **Documentation** – good guidelines and cataloguing / indexing templates and spreadsheets containing basic catalogue entries are provided to the volunteers. At Stoke-on-Trent, there is a field in the collection management system that provides instructions directly to the volunteers e.g.: list each item in the description field; add covering dates in the date field; some items may be suitable for digitising/transcribing; index names
- **Quality control** – in the Quarter Sessions project the volunteers quality check each other's work. For all projects the 'perfect approach' has the Archivist doing a final quality control check before it is made live on the online catalogue.

What were the challenges?

- **Arrangement** – At Stoke-on-Trent City Archives if an Archivist has not been used to sort the collection and create a basic catalogue initially then the project management and quality control is more challenging.
- **Knowledge and expertise** – the background of the Stoke-on-Trent volunteers means they have good knowledge about the collections. However, this can also be a challenge - some volunteers can sometimes try to catalogue in too much detail. This can make the catalogue difficult to use and slows down work.
- **Capacity** – staff capacity to supervise the volunteers is a constant challenge. The group co-ordinator can help with this.
- **Import tables** – the Quarter Sessions project had an issue early on where the volunteers added empty rows into the tables, a minor issue but an unnecessary complication to the import stage. A process however simple needs checking at regular intervals. When projects have used import tables the volunteers sometimes get frustrated when there are uploading delays and they cannot see their results appearing live in the catalogue.

Legacy and future plans

The Archive Service has an outstanding volunteer programme with 119 volunteers contributing 8,641 hours in 2015-2016. Other cataloguing projects have included Estate collections. They are now working in collaboration with the University of Keele and University of Liverpool on AHRC funded research projects which use volunteers. The proposed new Staffordshire History Centre has received HLF Round 1 development funding to create a two-storey link between the Staffordshire Record Office and the William Salt Library in Stafford. In addition, more than 100 volunteers will be enlisted to

help deliver the History Centre project, which will reach out to historians and people interested in researching their family history.

Further information

- [The Minton Archive](#)
- [The Michelin Archive](#)
- [Staffordshire History Centre](#)
- [Catalogue Link to Quarter Sessions Rolls](#)

4.9 Wigan Archives and Local Studies

About the archive

Wigan Archives and Local Studies operates two services within the Borough:

- Wigan Local Studies, based on the first floor of the Museum of Wigan Life.
- Wigan Archives and Leigh Local Studies, based at Leigh Town Hall, where public access is provided to both the borough's archive collections (since 1974) and Leigh Local Studies collections.

Wigan Archives and Local Studies had 102 volunteers contributing 8,033 hours in 2015-2016. The volunteers undertake a range of activities including cataloguing, indexing and transcription.

Key lesson

Using their search room as a space for the volunteers has enabled them to develop an extensive volunteer programme and create a vibrant atmosphere. However, it does present challenges around noise and lack of space.

What worked well?

- **A strategic approach** – the archive identified cataloguing priorities by using the Logjam methodology⁶. It also prioritised collections that were useful for family historians. Their cataloguing backlog has now been reduced.
- **Box listing** – most of their uncatalogued collections were not complex and did not need arrangement. A box listing approach is used for these collections. A couple of collections that are slightly more complex have been arranged by an Archivist before the volunteers catalogued items in a series.

"Collections don't always need to be catalogued in a hierarchy to be made accessible"
Alex Miller, Archives and Local Studies Manager

- **Search room** – the volunteers work in the search room. This makes supervision and support easier. It also creates a vibrant and sociable atmosphere. It can make the search room feel less intimidating to new users. The volunteers catalogue directly onto laptops or computers. However, it does present some challenges (see below).
- **Advocacy** – the volunteering programme has raised the profile of the archive in the Council and the community. It links strongly to the corporate strategy and the

⁶ Logjam – an audit of uncatalogued collections in the North West (The North West Museums, Libraries and Archives Council, 2004) - <http://www.nationalarchives.gov.uk/documents/archives/Logjamfullreport.pdf>

Wigan Deal - an informal agreement between the Council and everyone who lives or works in Wigan to work together to create a better borough.

- **Building community capacity** – some of the volunteers have used their cataloguing skills to catalogue the records of local organisations they work or volunteer for. The archives have then been deposited with Wigan Archives and Local Studies.
- **Documentation** – good and simple templates for the volunteers reduces the amount of support volunteers require and reduces the amount of time spent on quality control. For example, one group of volunteers have been listing individual documents in the Borough of Wigan Quarter Session bundles. A guide on the different types of documents was developed by staff.
- **Autism** – the archive has been working with Adult Social Care to develop placements for adults with autism or learning difficulties. Their work includes cataloguing and indexing work.

What were the challenges?

- **Noise and space** – the small search room means there is a lack of space for working on collections. It can also get quite noisy. As part of their [Regenerating Wigan Archives](#) project they hope to create a new spaces for volunteers adjacent to the search room. Most volunteers working on collections want a space near the search room, but separate so they can chat easily. However, some volunteers do want a quiet space.
- **Capacity** – staff capacity to support the volunteers can be a challenge. They used to have lots of different volunteers working on their own projects. However, the service has moved to a project or group approach. They have 3-4 projects running at one time. Volunteers are assigned to each project. This works better than having lots of separate projects.
- **Variety** – they work hard to try and keep it interesting for the volunteers. Volunteers will sometimes move projects – they like variety. Some volunteers might find certain collections less interesting.

Legacy and future plans

They have received initial support from the Heritage Lottery Fund for the [Regenerating Wigan Archives and Local Studies project](#). The project aims to redevelop the Borough's Archives, based at Leigh Town Hall, with the creation of a new public searchroom, heritage exhibition space and expanded specialist storage strongrooms for the archive collections. It will also include an expanded volunteer programme. They will also continue to work with Adult Social Care to offer supported volunteering opportunities.

4.10 National Library of Wales

About the projects

The National Library of Wales volunteering scheme has been engaging with volunteers since 2012, including all ages and backgrounds. Participants enhance their workplace and social skills while helping to make the Library's national collections more accessible to a wide audience in different ways, including transcribing text, creating databases, digitising, research, conservation tasks, public presentations and crowd sourcing. 84 onsite project volunteers were engaged last year.

Key lesson

Clearly defined roles and responsibilities are important when developing volunteer projects.

What worked well?

- **Clearly defined roles and responsibilities** – all volunteer projects go through a three stage approval process – Steering Group, Trade Unions and Senior Management Team. The volunteers do not undertake cataloguing work but will do work that help enhance it e.g. sort photographs prior to cataloguing, retro-convert accessions books, transcription.
- **Dedicated resource** – there is a dedicated staff resource for managing and supervising the volunteers. They are able to meet volunteers on a daily basis to discuss and address any problems that may arise. There is also strong support from senior management.
- **Crowdsourcing** - The Cynefin project has created an online resource which can be freely accessed to research the tithe maps and their indexes in an efficient and innovative way. In order to create the online resource, a crowdsourcing website was created to allow anyone to contribute to the project by volunteering online to transcribe or geo-reference. 769 volunteers participated in this.
- **Wikimedia UK** – the National Library of Wales have appointed a Wikipedian in Residence. Some volunteers have assisted with writing articles and translation to Welsh.
- **Training** - volunteers are encouraged to join in-house training, such as digitisation, editing Wikipedia, family history, crowdsourcing and conferences. A strong partnership with the People's Collection Wales (PCW) programme has meant volunteers have benefited from accredited digitisation training while scanning and providing metadata for over 6,000 images for PCW's website.
- **Variety** - a variety of tasks has allowed the Library to cater for different levels of experience. A skills audit at an early stage is useful to assist with matching volunteers to tasks that utilise their expertise.

- **New audiences** - volunteers who had not previously used the Library now have the confidence to use the facilities regularly.
- **Student placements** – a partnership with Aberystwyth University offers placements to support work-related modules.
- **New skills** - unemployed volunteers have gained workplace and social skills, e.g. IT, organisational, increased self-esteem.

What were the challenges?

- **Capacity** – it is important that the volunteers are well supported and have one to one time with staff.
- **Staff confidence** – reassuring staff that volunteers would be adding value to the Library's work but not replacing paid staff posts.

Legacy and future plans

Volunteering is now embedded in the Library's work and will continue to expand across departments. For example, a new project is currently being developed, focusing on interpreting a large collection of photographs to capture the social history of areas of north Wales. This involves building a template for an online crowdsourcing platform, which will also be suitable for other collections held at the National Library. The crowdsourcing platform will increase opportunities for people to become digital volunteers by undertaking transcription and interpretation tasks, therefore making more of the national collections accessible to and better understood by users worldwide.

Further information

- [Cynefin project](#)
- [Cynefin project volunteer guidelines](#)
- [Wikipedian in Residence at the National Library of Wales](#)
- Lyn Lewis Dafis, Lorna M. Hughes and Rhian James, Chapter 6. What's Welsh for "Crowdsourcing"?: Citizen science and community engagement at the National Library of Wales in Dr. Mia Ridge, *Crowdsourcing Our Cultural Heritage* (Farnham, 2014)

4.11 Bristol Archives – Artspace Ltd.

About the project

Bristol Archives and Spike Island Artspace Ltd. received a cataloguing grant of £2000 from the Business Archives Council in 2014. Spike Island is an international centre for the development of contemporary art and design in Bristol. At the root of Spike Island is 'Artspace', a pioneering artist-led co-operative established in the mid-1970s which sought out and administered affordable studio spaces for artists within disused warehouses adjacent to Bristol's docks.

In 2016, Spike Island celebrated 40 years since the establishment of their first artist studios and the organisation was keen for their archive collection to be catalogued as soon as possible so that it might be used for anniversary preparations. Although most of the collection had been deposited at Bristol Archives in 2014, the archives service was already committed to a full programme of work, and did not have the capacity to begin arranging and cataloguing such a large collection in-house. The grant enabled the collection to be catalogued so that it might be researched and used to inform Spike Island's programme of anniversary events.

Key lesson

The knowledge and expertise of volunteers can help provide contextual information to inform the arrangement of a collection.

What worked well?

- **Arrangement by an archivist** – a freelance archivist was employed initially to help sort the collection and undertaken cataloguing to file level. The collection was quite chaotic and challenging to arrange.
- **Expertise and knowledge of volunteers** - the freelance archivist was supported by two volunteers who were part of the original group of Artspace artists from the 1970s. They helped repackage, identify items and provide contextual information – particularly around the various classes of records grouped under 'Artistic Programme'.
- **Detailed catalogue descriptions** – a team of three volunteers were recruited through Artspace to catalogue 243 files to item level. Each file had 80-100 item level descriptions. The volunteers tended to be young artists. Some of the volunteers could identify other artists and art equipment in the photographs.
- **Enthusiasm of volunteers** – the volunteers chose what files they would like to catalogue. This helped keep them motivated and interested in the project. They showed great enthusiasm for the project.

- **Documentation and training** – good training, guidance and templates were developed for the volunteers. The quality of the cataloguing was good.

What were the challenges?

- **Resource** – winning the grant prompted three additional deposits. This was great for the collection, as it is now much more comprehensive and contains many more records relating to the early years. However, it presented Bristol Archives with more material than first envisaged. A Bristol Archives archivist spent two weeks creating catalogue records for the files within their database.
- **Restricted access** – some items contained personal information or commercially sensitive information. An archivist made decisions about access restrictions in collaboration with the depositor.
- **ICT** - the laptops supplied for the volunteers to carry out their work could not be connected to the Council's network due to issues with physical network points and the cabling required. However, the volunteers worked on an Excel spreadsheet each through Google Documents. This worked well for both the volunteers and the Bristol Archives staff as it made managing the output easier.

Legacy and future plans

Bristol Archives have developed much closer links with Spike Island and have an ongoing programme of volunteers to assist with item level cataloguing the collection.

Further information

- [Online Catalogue](#)
- [Project Evaluation Report](#)

5. Make a start

From sophisticated crowdsourcing platforms - such as Libcrowds or Zooniverse - engaging huge online audiences, to the patient management of small groups of company veterans or multilingual enthusiasts, the range of options available for approaching community cataloguing projects has never been wider.

This guidance recognises that not all services are the same and isn't suggesting a 'one size fits all' approach. Instead, it provides you with what you need to get started: *Key advice*, *Case Studies*, *Practical examples*, useful templates and a simple *Checklist*.

Using volunteers in all archive activities is possible and that includes cataloguing. You just need to think about how their contribution best fits with your priorities, target audiences and collections. If you invest in your volunteers, your service, your users - and the volunteers themselves - will all enjoy the benefits.

6. Checklist

- 1. Establish clear aims and objectives**
What are you trying to achieve with your volunteer cataloguing project? What are the benefits for your volunteers, the collection and your users?
- 2. Define roles and responsibilities**
Identify the type of cataloguing tasks volunteers could do. Involve staff and other stakeholders (e.g. Trade Unions) in drafting volunteer role descriptions.
- 3. Could the project be delivered online?**
Explore new digital opportunities for remote volunteering or crowdsourcing.
- 4. Use the knowledge and expertise of volunteers**
Volunteers bring a different perspective, their own skills and experience, and a new voice to cataloguing.
- 5. Invest in training and support**
Good quality training and support improves the volunteer experience and the quality of their work. Volunteers value good training, induction and staff support.
- 6. Create good documentation**
Simple volunteer guidelines and templates are essential. This helps them deliver quality work and make projects run more smoothly.
- 7. Use an archivist for preparation work**
Large and complex collections may require an archivist to work on the collections first – to sort, arrange and do initial cataloguing.
- 8. (Don't just) box list**
Box listing is simple and quick for volunteers to do but don't just do it: consider if it is genuinely the best option for your project.
- 9. Think creatively about space**
Some services have volunteers working in the search room. Other services use a separate space or room for volunteers to do collections work in.
- 10. Use a group approach**
Creating groups of volunteers for specific projects makes supervision easier. Use certain volunteers as group co-ordinators.
- 11. Build in quality control**
Proper planning and input from collections management staff helps reduce the amount of quality control work required.

Appendix 1 Further reading and information - archive volunteering

Archives and Records Association – Reports and Case Studies

- ARA Volunteering Committee, [Metrics for Volunteering in Archives](#), Recommendations from the ARA Volunteering Committee (January 2016)
- ARA Volunteering Committee, [Volunteering in Archives 3rd Action Plan - 2015-2017](#)
- Caroline Williams, [Volunteering in Archives 2014](#) (February 2015)
- Caroline Williams, [Executive Summary of Managing Volunteering in Archives](#) (January 2014)
- Caroline Williams, [Full Report of Managing Volunteering in Archives](#) (January 2014)
- Helen Lindsay, [Volunteering in Collections Care: Research Report](#) (2011)
- Helen Lindsay, [Volunteering in Collections Care: Best Practice Guidance](#) (2011)
- Louise Ray, [Volunteering in Archives](#) (National Council on Archives 2009)

Training

- Archives and Records Association [Core Training](#) – includes a course on 'Archives and Volunteers'

The National Archives

- [Volunteering at the National Archives - The National Archives' approach to user participation](#)
- [Handbook for volunteers](#)
- [Volunteering policy](#)

Appendix 2 List of people interviewed for case studies

- Malcolm Boyns, Archivist, Bristol Archives
- Julie Courtenay - Collections Leader, Gloucestershire Archives
- Gwyneth Davies, Volunteers' Co-ordinator, National Library of Wales
- Becky Farmer, Project Archivist – Made in Greater Manchester, Wigan Council
- Louise Ferriday, Archivist, Stoke-on-Trent City Archives
- Gillian Fewings, University of St Mark and St John
- Nicola Herbert, Archivist, Marks & Spencer Company Archive
- Rebecca Jackson, Archivist, Staffordshire Record Office
- Andrew MacGregor, Deputy Archivist, University of Aberdeen Special Collections
- Mary McKenzie, Acting Museums and Archives Manager, Shropshire Museums and Archives Team
- Alex Miller, Archives and Local Studies Manager, Wigan Archives and Local Studies
- Joanne Robson, Archive Officer, Oldham Local Studies and Archives
- Richard Wiltshire, Senior Archivist - Business Archives, London Metropolitan Archives