

# ARCHIVE COLLECTIONS

## Information Policy

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12/2024

## Overview

This policy sets out the key criteria covering information about archives at The Postal Museum.

This policy will be communicated to The Postal Museum staff and via The Postal Museum website, and to external agencies and others with an interest on demand. It will be reviewed every two years.

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## 1 Aim and Background

Describing our archival holdings including The Royal Mail Archive<sup>1</sup> tells staff and users what we hold. It is a central part of the operation of a competent professional service and a key part of The Postal Museum's Archive Services Agreement<sup>2</sup> with Royal Mail and Post Office Limited. Documenting collections is a core part of fulfilling The Postal Museum's mission to 'tell the story of postal communication and its impact on a global society'.<sup>3</sup>

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

From at least the 1960s onwards until the 1990s, Royal Mail Heritage (at this stage The Royal Mail Archive was managed internally by the postal business) produced hard copy catalogue listings and kept paper accession information. In time these started to be produced digitally. In the early 2000s a Collections Management System (CALM) was purchased. In 2005 an online catalogue was launched and The Royal Mail Archive achieved designated status from the then Museums Libraries and Archives Council (the service also achieved Archive Service Accreditation from The National Archives, UK in 2019), which among other things requires cataloguing to be managed professionally and strategically. Since the mid-2000s the proportion of our archive holdings catalogued and available online has remained very healthy.

Digital material coming into the collection is entered and catalogued in the same way as paper records. The Transfer of Title paperwork is designed to capture relevant metadata for these records. In 2023 we purchased a Digital Preservation System and have now started ingesting born digital content into it.

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

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<sup>1</sup> The Royal Mail Archive is the business archive of Royal Mail Group Ltd and Post Office Ltd dating back to 1637.

<sup>2</sup> The Archive Services Agreement is a legal agreement in which The Postal Museum agrees to manage The Royal Mail Archive until 2040 in exchange for an annual service fee.

<sup>3</sup> From The Postal Museum 'Mission and Vision', <https://www.postalmuseum.org/about/>.

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

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## 2 Legislative context

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

The Freedom of Information Act 2000 and Data Protection Act 2018 also help determine the way archive information is managed.

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## 3 Systems used

Axiell's CALM ALM is currently used for managing all aspects of collections information from initial entry into the Museum to cataloguing to ongoing management. Our online catalogue takes The Postal Museum's CALM data and puts it into Orangeleaf's Collections Base search portal database. Digital material is stored and preserved on Preservica Digital Preservation software. There is also a Preservica Universal Access portal to make digital records available to those outside of The Postal Museum's Collections team.

Selected hard copy catalogues are available in the Archive research room and on request equivalent catalogues can be provided as a PDF or other attachment.

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## 4 Deposit and accessioning

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

- as a transfer from a Royal Mail or Post Office Ltd department or from off-site semi-current storage (including appraised files created under the Registries and Records Centre systems);
- as a gift from a donor, including unsolicited material;
- as a loan for an exhibition, conservation, or digitisation;
- as a purchase;
- for identification or temporary safekeeping.

Upon receiving an enquiry or offer of deposit, the Senior Archivist or Archivist (Cataloguing) establishes whether the material fits into the Archive Development Policy, checking also that the material is not a duplicate of material already held in the collection. Depositors complete a Transfer of Title form. A standard letter/email declining an offer of material is used when the material does not fall within the collecting remit of The Postal Museum.

An entry record should be completed in the CALM Entry and Accession database on the day of arrival of the material. The E[ntry] number is written in pencil on the envelope/packet/box. For born digital material the E[ntry] number is given to the folder containing the material on the secure server, or within Preservica. It will also be written on any removable media (such as USBs or CD ROMs).

The aim of an entry record is to:

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

Archive material or its enclosure is annotated with its entry number and often in the case of Royal Mail Archive material its potential POST class (the section of the Archive the material best fits into) and, potentially after an initial period in the Quarantine Room where it is assessed by Conservation staff (if appropriate), boxed and placed in an appropriate space in the repository along with a printout of the entry record.

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

Where appropriate, paper copies of accession records and supporting documentation are placed in appropriate files.

Details of new archive material entering the collection are highlighted to The Postal Museum's Collections Sub-Committee, Royal Mail and Post Office Ltd in regular reports and can also go into The National Archives' annual Accessions to Repositories Survey.

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## 5 Disposal and withdrawals

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

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## 6 Location and movement control

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

Material may exit The Postal Museum for several reasons, for example:

- As a loan for exhibition purposes;
- As a loan for use by a Royal Mail/Post Office Ltd department;
- For conservation work to be carried out externally;
- To be copied or reproduced where facilities do not exist in-house;
- For permanent transfer to a new custodian.

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

In every case the following information is required to allow full accountability for all exits of material from The Postal Museum:

- Full details of receiving body, including contact details of individual responsible;
- Details of person giving authorisation for the exit, including position;
- Signature of both parties;
- Date.

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

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## 7 Cataloguing

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

When ready for public dissemination CALM catalogue data goes onto the online catalogue. In November 2024 over 114,000 Archive catalogue records were available online; about a fifth (23,000) also had digitised images attached for exploration. These include photographs, posters,

artworks, philatelic items, and other formats. The Postal Museum has a well-equipped Digitisation Studio and high-quality digital capture can be done entirely onsite.

According to a 2004 strategy, 3% of the Royal Mail Archive was catalogued to a sufficient standard to be published immediately (on CALM), 8% after editing, 85% needed major work on existing finding aids, and 4% was completely uncatalogued. By the late 2010s these figures had shifted to approximately 87% published online, 6% with a draft finding aid requiring work and 5% uncatalogued and similar levels remain today.

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

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

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

Born digital material is ingested onto Preservica and when catalogued put into relevant folders on the system. Preservation metadata is automatically generated. Descriptive metadata based on the Dublin Core vocabulary is either ingested along with the content or added later.

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## 8 Staffing and Funding

All archive staff have some involvement in ensuring good quality information is recorded about material. Currently the team consists of six people (including the Senior Archivist), five of whom are professionally qualified. Information is overseen by the Senior Archivist and a dedicated role of Archivist (Cataloguing). Other cataloguing work may be done by volunteers (overseen by an archivist) or as part of discrete project-based funding. The Museum levies an annual service charge to Royal Mail and Post Office Ltd according to an Archive Services Agreement to manage the Archive including providing appropriate information on its contents.

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## 9 Protecting archival information

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