



**Guide to archiving
digital records
for volunteer and
community groups**

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1: Introduction

This is a guide for volunteer, grassroots and community groups, created to assist them with cataloguing and preserving their digital records. Although the focus of this guide is primarily digital records, it also provides information on cataloguing and organising physical records.

The guide is informed by the *Archiving the 8th E-guide*¹, produced by the Wellcome Trust-funded project 'Archiving the 8th', and by the findings of the 'Archiving Reproductive Health' project to date.

The guide intends to provide clear, easy to follow and accessible instructions and advice for small organisations with limited resources, enabling them to make the best use of what resources they have and to preserve a cross-section of their digital records.

The guide aims to enable small groups to organise their materials in such a way that if they have the opportunity to deposit them in a trusted digital repository such as the Digital Repository of Ireland, they will have well-organised collections in accessible and interoperable formats.

The guide will also draw on the Community Archive Training resources developed over the last number of years by the Digital Repository of Ireland.²

¹ 'Archiving the 8th: A beginner's guide to archiving material from the 2018 referendum on the Eighth Amendment' (2021) Available at <https://archivingthe8th.ucd.ie/resources/>.

² Digital Repository of Ireland User Guides. Available at <https://guides.dri.ie/>.

2: Archiving as a community or volunteer organisation

Archiving Reproductive Health

Archiving Reproductive Health (ARH) is a Wellcome-funded project coordinated by the Digital Repository of Ireland (DRI), which is working to preserve digital material created by grassroots organisations working for reproductive justice in Ireland, especially during the 2018 referendum to repeal the Eighth Amendment of the Irish constitution.³

This guide is one of the required outputs of the ARH project. It aims to provide practical advice for non-specialists who wish to put some basic archival order on the material collected by the volunteer or community organisations they are part of. While it is written with ARH stakeholder organisations in mind, the principles in this guide can be of use to any volunteer or community organisation.

Much of Archiving Reproductive Health's work with volunteer and community groups involved in reproductive justice campaigning in Ireland has shown us how much work is done by relatively few people to create and drive these campaigns. Archiving an organisation's records is another task that can seem daunting to already overworked volunteers. This guide aims to simplify the task so that at the very least a cross-section of your organisation's records are preserved in the long term.

Imagine you are in a volunteer organisation that has worked out of one space (e.g. a rented office) for a number of years. You are faced with the requirement to move out of that office, and the space you are moving to has a quarter of the storage available than in your original office. You will not be able to keep everything your organisation has amassed over the years. While moving, you also want to put some order on the many years' worth of digital material you have amassed as an organisation over the years in your shared cloud storage drive (e.g. Google drive). You know that you do not need to keep everything, but of what you do want to keep, you want to be sure it is organised and protected.

What can you do?

A lot, actually! While a formal archive needs to be managed by professionals, non-specialist individuals and groups can do a lot to ensure that personal/organisational collections are suitable for eventual archiving.

Your priority in this situation is identifying and sorting what you can keep, and what you can get rid of. This is called **appraisal**.

³ More information about ARH can be found at the project page on the DRI website: <https://www.dri.ie/archiving-reproductive-health>.

3. Appraisal

The sections in the Appraisal chapter will guide you through the steps you need to take to appraise your material.

3.1: **'What do I have?'** describes different types of physical and digital records.

3.2: **'What should I keep?'** gives advice on the kind of material that may be useful to keep for an archive.

3.3: **'What should I get rid of?'** advises on what organisational records are suitable for archiving, and what aren't.

3.4: **'How should I store it?'** gives advice on the best way to preserve the material you decide to keep so that it remains in good condition.

3.1 Appraisal: 'What do I have?'

Each organisation will have different types of material. These lists are some of the most common kinds of physical and digital material created by community/volunteer organisations that are suitable for archiving.

Examples of physical records

- Leaflets — informational, diagrammatical, canvassing purposes.
- Event materials — posters, flyers.
- Merchandise — stickers, clothing, badges.
- Printed press releases.
- Artworks — crafts, home-made banners, posters etc.

Examples of digital records

- Internal organising documents such as meeting agendas, minutes.
- Published material such as reports, submissions, policy papers.
- Design material such as logos, branding, poster and flyer design.
- Website content such as blog posts, press releases.

These examples are not exhaustive, and your organisation may have types of material not listed above. These are mainly guides to get you started.

3:2 Appraisal: 'What should I keep?'

The 3-2-1 rule

The 3-2-1 rule is a useful standard for preserving and archiving digital material. The principle is as follows:

- Keep two copies of a physical object (where copies exist).
- When you have a digital object you want to preserve, you should have three copies of it stored in different location. You should start by converting the material you want to keep into a stable open format⁴.
- Example: You want to keep a document created in Microsoft Word or Google Docs. Here is a way to do that:
 1. Convert the document into a PDF
 2. Name it using a consistent and recognisable convention. E.g. Organisation_PressRelease_Date_Archive.pdf
- To apply the 3-2-1 rule, you should do the following:
 - Store one copy in a cloud storage programme such as Google Drive or Dropbox.
 - Store a second copy on an external hard drive.
 - Store the third copy on a local drive, for example on your laptop or desktop computer.
 - In the case of cloud storage, ideally you will be using an organisation's storage drive, rather than individuals', but if your organisation does not have a shared cloud storage account, you may have to save them on an individual's drive.

Note: It's very important that you **document these decisions** and (in the case of digital) storage location as you are working, even just in notes, because **you will need this information later for cataloguing**.

3:3 Appraisal: 'What should I get rid of?'

Data protection - the basics

- Everything containing personal information about people (living subjects) is subject to GDPR (The General Data Protection Regulation, an EU-wide data protection legislation).⁵
- This doesn't mean your organisation can't collect and keep personal data, just that there are limits to how long you can keep different types of personal information and there must be a justified purpose for you collecting the information
- When personal information has to be destroyed, it should be shredded (if physical) or deleted securely (i.e. deleted AND removed from computer/cloud drive trash.)
- Data protection legislation only applies to **living people**.

⁴ Examples of open formats can be found in this document at '[Digital storage](#)', pp. 9–10.

⁵ Regulation (EU) 2016/679 of the European Parliament and of the Council <https://eur-lex.europa.eu/eli/reg/2016/679/2016-05-04>.

Data protection - the details

Most organisations will accumulate personal information about people in the course of their activities. Data protection law applies to this kind of information. However, this does not necessarily mean that material containing personal information cannot be archived.

There are two main types of information that are subject to data protection legislation such as GDPR.

These are **personal data** and **special category** data. Often, these are the same data.

See [Appendix 1](#) for definitions of 'personal data' and 'special category data'.

See [Appendix 2](#) for examples of personal data and special category data.

There are many reasons why personal information may be collected. For example, someone might sign up to join your organisation using an online form. You would then keep their information for as long as they were a member/the organisation exists. Or you might collect information to enable a transaction, for example e-commerce. Or an organisation may collect names and email addresses from people who have signed up to attend an event the organisation is holding. In all these cases, the information should only be used for its specified purpose and deleted afterwards.

Generally speaking, if an organisation has a data protection policy, this type of personal data will not be kept in the long term after the reason for collecting it for the first time has passed.

GDPR archiving exemption

As already noted, GDPR mandates that businesses and organisations should not retain personal data gathered during its usual business for longer than certain set periods of time.

However, the Regulation contains a clause specifying that personal data can be kept for longer periods of time:

"By way of an exception, personal data may be kept for a longer period for **archiving purposes in the public interest** or for reasons of scientific or **historical research**, provided that appropriate technical and organisational measures are put in place (such as anonymisation, encryption, etc.)".⁶

'Archiving purposes' are not specifically defined in the legislation. However, if your organisation has already applied a data protection policy, excessive personal and special category data is likely to be already deleted. The material you select for archiving may still contain personal data, but it is less likely to be special category data and unsuitable for archiving purposes.

⁶ 'Principles relating to processing of personal data' Article 5(1)(e), Recital (39) of the General Data Protection Regulation, The European Parliament and Council, 2016 <https://eur-lex.europa.eu/eli/reg/2016/679/2016-05-04>

Identifying personal data in your collection

Depending on how old your organisation is, or if it is still active, there may not have been a formalised data protection policy. You may find that there are records of event attendance or membership going back many years.

The first thing you should do is decide what material is most valuable from an archival point of view - what will help a person in the future find out essential information about your organisation and what it did? Once you have separated out that material, you should review it to see if it contains personal data and/or special category data (Again, see [Appendix 2](#) for a list of examples of both kinds of data.)

If the material you want to archive contains personal or special category data, you can do a brief **data protection assessment** on it. [Appendix 3](#) contains examples of data protection assessments that may help you make assessment decisions that adhere to the GDPR archiving exemption.

Assessments may include:

- Deciding not to archive certain material
- Redacting personal data from material and then archiving it.
- Anonymising personal data from material and then archiving.
- Leaving in personal data that is not immediately identifying (e.g. first names only).

When it comes to data protection assessments, there is no one-size-fits-all policy, however the information here and the hypothetical examples in [Appendix 3](#) may help you categorise the material you have.

Financial records and other business records

You may have a wide range of financial, accounting data and other business records. Like records containing personal data, you may want to keep some of these for archiving purposes. The level of access you wish to provide to these kinds of records is up to you.

From a business records (not an archiving) point of view, financial records should be retained for 7 years after the financial year they cover.

They can be destroyed after that point, though some organisations may want to keep it longer. This is a governance question rather than a data protection or archiving issue.

General disposal

You will no doubt have a lot of material that you know is not necessary to keep. If it does not contain personal information it can be simply thrown out, deleted or recycled. For example, you may have multiple copies of a publication your organisation created. If you have selected copies for archiving, then you can get rid of the rest if you need to.

Checking in with peers

It's a good idea to check with your fellow volunteers about the appraisal process - while this can delay proceedings, it's better to make sure there isn't something a person really wants to keep themselves, even if it has no archival value, before throwing it out.

3:4 Appraisal: 'How should I store it?'

Physical storage

The best storage for physical materials is acid free boxing / foldering. But this is expensive for non-specialists.

Good quality folder boxes are suitable in the short-term.

Avoid staples, paper clips and metal in general (plastic paper clips are OK).

Your home won't have archival-quality climate conditions, but if you keep your material somewhere cool, dark and dry that will go a long way to keeping it in good condition.

Digital Storage

There are only a few specialist repositories for reliable long-term preservation, such as the Digital Repository of Ireland. DRI works on a membership basis, where an organisation joins for a fee and adds its material to the repository. Many small organisations will not have the capacity to join an organisation like DRI right away, but in the meantime you can store digital records reasonably securely in the cloud and on hard drives.

Invest in good quality hard drives, such as Lacie or G-Technology. Avoid cheaper consumer brands. Most hard drives will only last about two years before they need to be replaced and the content migrated.

Try to have duplicates / mirrors of your archives in case of technological failure (see [3-2-1 rule above](#)).

Remember that cloud storage is not long-term digital archiving. Systems run by private companies can go out of business, so any data stored in these kinds of systems can potentially be lost. If you remember to always follow the 3-2-1 rule, your data will be safer.

Storage either in cloud drives or on hard drives can cost money, though cloud storage is becoming quite cheap for smaller collections. Google Drive and Dropbox are both user-friendly and reasonably affordable options. Note that when uploading photographs to Google Drive, it may not maintain the uploaded quality of the original photo, so be sure to have the original stored separately on a hard drive.

Open formats

Use open formats for digital files where possible. Good ones include:

- PDF (text and image)
- RTF (Rich Text File)
- ODT and ODS (Open Office)
- MP4 (audio)
- WAV (audio)
- JPG (image)
- TIFF (image)
- PNG (image)

4. Cataloguing

Once you have decided what you want to keep, it's important to catalogue it in some way.

This ensures that:

- You and others in your organisation know what you have in the archive.
- If you donate it to an institution, the archivist will be able to organise and make it available to researchers and the public sooner.

This section will give guidance on how to catalogue your collection, and explain some archival terms.

4.1: **'What is metadata?'** explains what metadata is, gives examples of how metadata is used, and recommends minimum metadata that should be applied.

4.2: **'Rights and licensing'** explains how copyright works, and how to apply open licences to your archive.

4.3: **'Metadata creation guidelines'** is a step by step guide to creating metadata for cataloguing, building on the previous sections.

4.4: **'The finding aid'** explains how the final catalogue should look and how to use it.

4.1 Cataloguing: What is metadata?

Metadata is any information that describes what something is. For example, every time you take a photo on your phone, the phone remembers and stores certain types of information about the photo, like the date it was taken, the type of phone it was taken on, the type of image file it is.

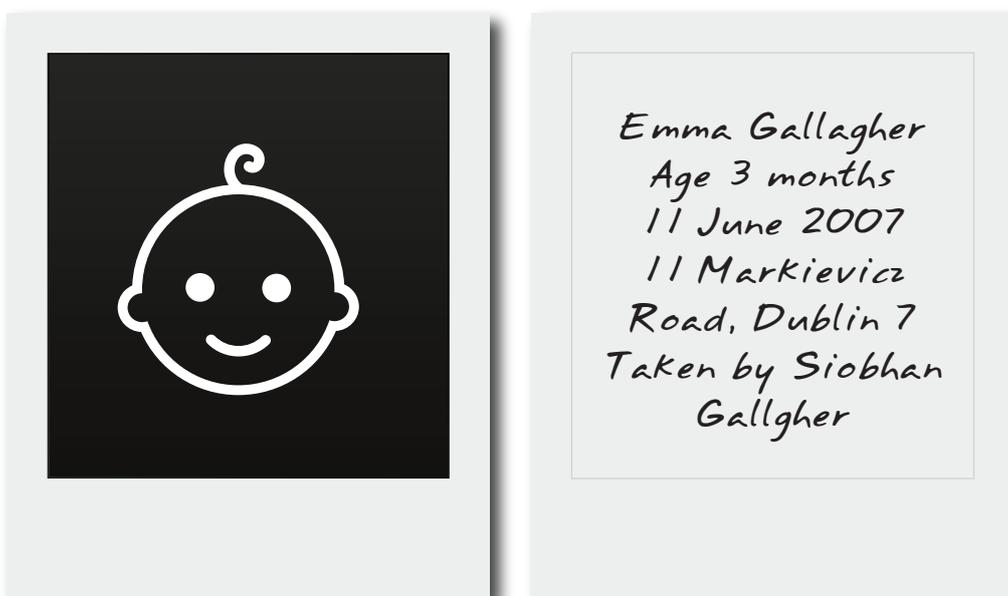
The metadata you use in cataloguing is simply information that a human creates to describe something in a way that helps others understand and locate it. This is called descriptive metadata.

Example of descriptive metadata

Basic descriptive metadata. This does not give much useful information.



Better descriptive metadata. This provides useful information about when and where the picture was taken, and who it is of.

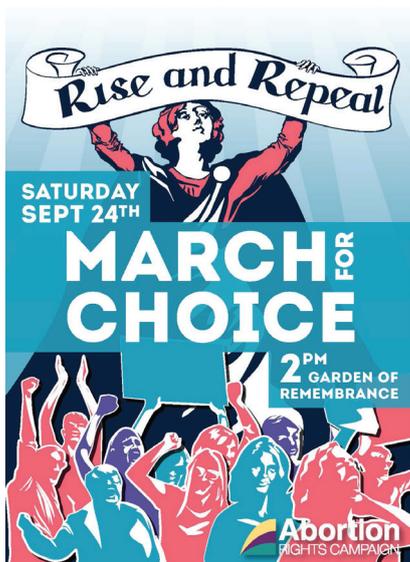


Recommended metadata

A metadata field is a category of information e.g. date a file is created, name of person(s) who created it.

These **6 recommended metadata fields** will help a lot in providing information about an object.

1. Title
2. Creator(s)
3. Description
4. Date (of creation or publishing)
5. Format (physical/digital format)
6. Rights and licence



An example of metadata associated with a digital object

Title: Flyer for 2016 March for Choice

Creator: Abortion Rights Campaign

Description: A PDF of the final design for the flyer used to advertise the 2016 March for Choice, which took place on 24 September 2016. The March's theme "Rise and Repeal" is reflected in the design, which depicts the words "Rise and Repeal" on a ribbon held by a female figure based on the header design of the early 20th century revolutionary newspaper issued by Inghinidhe na hÉireann "Bean na hÉireann".

Date: 2016-09-24 [24 September 2016]

Format: PDF

Rights: Copyright Abortion Rights Campaign. Licensed for reuse under a Creative Commons Attribution-ShareAlike licence.

4:2 Cataloguing: Rights and licensing

Who is the copyright holder of a particular file or object? Do they give permission for the material to be archived and published online in a digital archive? **This is one of the most important things to establish when cataloguing.**

The creator(s) of material are the automatic rights holders. A creator can be an organisation, as seen in the previous example.

If the object is still protected by copyright law (which usually lasts for the life of the creator plus 70 years), the copyright holder needs to give permission for it to be licensed for reuse. A licence allows you to make archival material available online.

Note: Digitising a work does not override the original copyright.

Creative Commons licences

There are lots of legal instruments to enable the publication and sharing of copyrighted material; the most commonly used is Creative Commons (CC).⁷

Good CC licences for archival purposes include:

- CC BY (Creative Commons Attribution): Sharing, reuse and adaptations (e.g. translations into other languages) are permitted. Credit must be given to the creator.
- CC BY-SA (Creative Commons Attribution-ShareAlike): Sharing, reuse and adaptations are permitted. Credit must be given to the creator. Adaptations must be shared under the same terms.
- CC BY-NC (Creative Commons Attribution-NonCommercial): Sharing, reuse and adaptations are permitted. Credit must be given to the creator. Only noncommercial uses of the work are permitted
- CC BY-NC-SA (Creative Commons Attribution-ShareAlike-NonCommercial): Sharing, reuse and adaptations are permitted. Credit must be given to the creator. Only noncommercial uses of the work are permitted. Adaptations must be shared under the same terms.
- CC0 (Public domain dedication). The copyright holder has decided to waive all copyright entitlements and has dedicated the work to the public domain. Anyone may reuse the work in any way without restrictions.

The Creative Commons website also features a Licence Chooser which you can use to find the licence that best works for you.⁸

Remember that CC licences are irrevocable - this means that you cannot change the licence

⁷ 'About Creative Commons licences': <https://creativecommons.org/about/cclicenses/>

⁸ Creative Commons licence chooser: <https://creativecommons.org/choose/>

you publish something under after it is published. It's worth familiarising yourself with CC licences so you can be sure that you pick the right one for your work. Think about a hypothetical user - what do you want them to be able to do with the material, and what licence would enable that?

If you are the creator of the material, you can go ahead and apply a CC licence or a Public Domain dedication while you are cataloguing. If someone else is the creator, or multiple people, or an organisation, you should contact them and ask if they give permission for their work to be licensed for reuse.

Note: If a work is out of copyright, you **cannot** apply a restrictive licence of any kind - you should note that the work is in the Public Domain. Creative Commons have a Public Domain Mark you can use for this purpose.⁹

Getting permissions from rights-holders

These are two suggested approaches to identifying the rights holders of material. Your own approach may vary:

- **Faster approach; good practice:** Have your organisation meet as a group and decide on a Creative Commons licence that you are happy to apply to the material you have created as an organisation. Ensure, as much as possible, that individuals who contributed to material are aware of the organisation's plans to publish the material online for archival purposes. Put the decision in writing and file it in your organisation's business records. The subsequent rights statement might look like this:
 - *'Public Talk Flyer' by [Organisation] is licensed for reuse under a Creative Commons Attribution Non-Commercial ShareAlike licence.*
- **Slower approach; best practice:** Track down all the individual creators (automatic rights holders) of any content you have and ask them if they are happy for it to be preserved and published online for archival purposes. The subsequent rights statement might look like this:
 - *'Public Talk Flyer' by [Organisation] and [Artist's name] is licensed for reuse under a Creative Commons Attribution Non-Commercial ShareAlike licence.*

If you take the faster approach, you can still credit individuals later on who contributed to particular documents (e.g., report authors, graphic designers) in the catalogue metadata.

⁹Public Domain Mark: <https://creativecommons.org/share-your-work/public-domain/pdm/>

Even if you don't have time to add individual credits to the catalogue, you should still note the information in a footnote or addendum so either you or a future cataloguer can include these credits.

Applying licences

The simplest way to apply a CC licence is by writing it in the metadata of your object or collection. It can also be included as a link, an embedded file, or a logo.

Some examples for how CC licence statements can be phrased:

- 'Public Talk Flyer' by [Organisation] is licensed for reuse under a Creative Commons Attribution Non-Commercial ShareAlike licence. <https://creativecommons.org/licenses/by-nc/4.0>
- 'Public Talk Flyer' (2018). Rights: [Organisation]. Licence: [CC BY NC 4.0](https://creativecommons.org/licenses/by-nc/4.0).
- 'Public Talk Flyer' by [Organisation], 2018, 

4:3 Cataloguing: Metadata creation guidelines

Now you are ready to write up your metadata!

You can write out metadata for a catalogue in a notebook, in a spreadsheet, in a Word document, in a programme specially built for it - the quality of the metadata is what matters, not the format in which it's created (Although you should avoid creating it in proprietary software that may not be accessible on most people's computers).

An archival catalogue is basically a hierarchical list. Think about how you would organise material in files and folders on your computer or hard drive. When you are creating catalogue metadata, you're creating a written description of this structure.

A simple way to start a catalogue is to write it up as a contents list, including the entire collection and specific objects.

Contents list steps:

- Give the physical box/folder/file, or the digital folder containing all the material a number. Write or note the number at the top of your contents list.
- It's a good idea to number your folders/boxes/files with a code as well as a written description, and include the code in your catalogue. Any code/numbering system is fine as long as it's consistent.

- Examples of numbering systems can be found in the more detailed examples outlined in Appendices 4-7.

See [Appendix 4](#) for an example of a basic contents list for a collection of any kind.

See [Appendix 5](#) for a cataloguing example for a digital collection.

See [Appendix 6](#) for a cataloguing example for a physical collection.

See [Appendix 7](#) for an example of a top-level contents list.

These examples are to help you get started and get a grasp of cataloguing your material.

If you are very stuck for time you can describe just the top-level folder. **However you should include information about rights holders and licence permissions at a minimum.**

4:4 Cataloguing: The finding aid

The catalogue you create is known archivally as a **finding aid**. It will look like a long document containing a list of the contents of your collection. It's also good practice to include an 'abstract' at the start of a finding aid. This is usually a description of the organisation or person that created the archive, with information about its history, aims, achievements and other significant information.

You should keep this document with the collection - in the top level of the digital collection (and in 2 other digital locations), or 2 printed copies with the physical collection (and a digital backup).

Cataloguing is probably the most time-consuming part of organising your organisation's archive, even at the simplest top-level method. It's worth it though, because it will save you and others a lot of time down the line, and will enable your organisation's archives to be made available to researchers and the public if it is subsequently donated to an archival institution.

5. Useful links

Hopefully the material in this guide will help you get started on basic archiving, and take some of the mystery out of digital archiving. Below are some links to useful resources that may be of additional help.

- Archiving Reproductive Health: <https://www.dri.ie/archiving-reproductive-health>
- Archiving the 8th: <https://archivingthe8th.ucd.ie/>
- Creative Commons: <https://creativecommons.org/>
- Archives Ireland: <https://www.archives.ie/>
- Eneclann: <https://www.eneclann.ie/>
- Arcline: <http://arcline.ie/>
- Archives and Records Association UK and Ireland: <https://www.araireland.ie/>
- Oral History Network Ireland: <https://oralhistorynetworkireland.ie/>
- Irish Community Archives Network: <https://www.ouririshheritage.org/>

Preparing materials for archiving can be time-consuming, but it doesn't have to be difficult. We hope this guide has been helpful!

6. Contributors

Several people have contributed to the material in this guide, both from the Archiving Reproductive Health project and the Archiving the 8th project.¹⁰

We are also grateful for the input from the Archiving Reproductive Health Stakeholder Advisory Forum.¹¹

If citing this guide, please use the following format: *Archiving Reproductive Health project (2023). Guide to archiving for community/volunteer organisations, [page number]. Digital Repository of Ireland.*

List of contributors

Dr Kate Antosik-Parsons, Trinity College Dublin / Dublin Bay North Repeal the 8th.

Dr Sarah-Anne Buckley, National University of Ireland, Galway.

Dr Kathryn Cassidy, Principal Investigator, Archiving Reproductive Health project at the Digital Repository of Ireland.

Ms Emma Clarke, Trinity College Dublin.

Victoria Darragh, Independent historian.

Dr Linda Doran, University College Dublin.

Dr Lisa Godson, National College of Art and Design.

Dr Lisa Griffith, Membership Manager, Digital Repository of Ireland.

Ms Estelle Gittins, Trinity College Dublin Library.

Dr Lorraine Grimes, Digital Archivist and Postdoctoral Researcher, Archiving Reproductive Health project at the Digital Repository of Ireland.

Dr Natalie Harrower, Principal Investigator, Archiving Reproductive Health project at the Digital Repository of Ireland.

Dr Sinéad Kennedy, National Executive, Together for Yes/ Maynooth University.

Clare Lanigan, Digital Archivist and Coordinator, Archiving Reproductive Health project at the Digital Repository of Ireland.

Kevin Long, Digital Archivist, Digital Repository of Ireland.

Kate Manning, University College Dublin Archives.

Dr Emily Mark-FitzGerald, Principal Investigator, Archiving the 8th project, School of Art History and Cultural Policy, University College Dublin.

¹⁰ Archiving the 8th: <https://archivingthe8th.ucd.ie/>

¹¹ Archiving Reproductive Health Stakeholder Advisory Forum: <https://www.dri.ie/archiving-reproductive-health#stakeholder-advisory-forum>

Dr Mary McAuliffe, University College Dublin.

Dr Maeve O'Brien, Research Co-ordinator, Archiving the 8th project.

Dr Aileen O'Carroll, Principal Investigator, Archiving Reproductive Health project at the Digital Repository of Ireland.

Gina O'Kelly, Irish Museums Association.

Preetam Singhvi, Junior Software Developer, Archiving Reproductive Health project at the Digital Repository of Ireland.

Orna Somerville, University College Dublin Archives.

Amy Walsh, Termination for Medical Reasons Ireland.

Appendix 1: Definitions of personal and special category data

Personal data¹²

“‘Personal data’ means any information relating to an identified or identifiable natural person (‘data subject’); an identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that natural person;”

Remember, GDPR only applies to data about living people.

Special category data¹³

“‘Special category data’ or ‘sensitive data’ refers to personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, and the processing of genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person’s sex life or sexual orientation.”

¹² Regulation (EU) 2016/679 of the European Parliament and of the Council, Chapter 1, Article 4(1): <https://eur-lex.europa.eu/eli/reg/2016/679/2016-05-04>

¹³ Regulation (EU) 2016/679 of the European Parliament and of the Council, Chapter 1 (51): <https://eur-lex.europa.eu/eli/reg/2016/679/2016-05-04>

Appendix 2: Examples of personal and special category data

Examples of personal data

- Names
- Addresses
- Phone numbers
- Email address
- Social media handles
- Medical information

Examples of special category data

- The personal data listed above, if it also includes:
 - Ethnicity
 - Political affiliation
 - Biometric data
 - Genetic data
 - Religion or beliefs
 - Trade union membership
 - Sexual orientation

Appendix 3: Examples of data protection assessments

Example 1

You have a flyer for an event your organisation held 7 years ago. The flyer contains the name of the speaker and contact details for the organisation.

Data protection assessment

The personal data (Person's name) probably falls under the GDPR archiving exemption as it is a record of a public event, at which the person agreed to speak publicly. The organisation's contact details probably do not fall under data protection law unless they are linked to a specific person. If they do fall under data protection law, it would be prudent to redact these details. Redaction can be done more easily on a digital object than a physical one.

Example 2

You have a document containing minutes for a public meeting held by your organisation several years ago. The minutes summarise what was said by members of the organisation and members of the public who were present. There is an attendance list containing people's full names. One sentence in the minutes identifies one of the named people attending as a member of a named trade union.

Data protection assessment

This document includes both personal data (the names) and special category data (an individual's membership in a trade union). One method of archiving it under the GDPR archiving exemption would be to redact or anonymise the personal and special category data.¹⁴ Another way would be to get explicit consent from the people present to include their personal and special category data in the archived document. That approach would also be compatible with the GDPR.

Example 3

You have a spreadsheet containing the names of registered attendees at an event that happened more than one year ago.

Data protection assessment

This is not something you need to keep from an archival point of view and should be deleted from a data protection point of view.

¹⁴ Redaction means the removal of certain details e.g. by using a black box over parts of the text or replacing the word in a digital document with [Redacted]. Anonymisation means replacing the details with alternatives, marked by a code e.g. replacing 'Jane Doe' with @@Joan Roe##.

Appendix 4: Example of a basic contents list

- Examples of basic contents lists:
 - Box 1: Files of correspondence relating to x or y.
 - Pamphlets, flyers, promotional material relating to x or y.
 - Files containing the minutes of meetings concerning x
 - File 1: Correspondence between x and y concerning z
- A box or file list will give you a quick overview of the contents. It will allow you to notice the condition of the material and if there are any immediate issues including the presence of personal or special category data.

Appendix 5: Example of cataloguing a digital collection

The [Volunteer Organisation] Digital Collection is located on [Organisation] cloud storage account and mirrored on [Organisation] hard drive.

The Digital Collection has 4 top level folders. These are named:

ARCTE001¹⁵: Training and Education

ARCEV001: Events Publicity

ARCMR001: Merchandise Design

ARCBO001: Board Meeting Minutes

The Training and Education folder contains two sub-folders. These are named:

ARCTE001-001: Training

ARCTE001-002: Education

The sub-folder ARCTE001-001: Training contains 2 documents. The metadata for these is:

Filename: ARCTE001-001_yymmdd_001_.pdf

Name: Training document 1

Creator: [Organisation]

Description: Summary of Organisation training programme for 2017

Contributor: [Name of training facilitator]

Date: 2017-07¹⁶ [July 2017]

Type: Training documents

Format: PDFs

Rights: Organisation Name; Facilitator name

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Filename: ARCTE001-001_yymmdd_002_.pdf

Name: Training document 2

[and so on]

¹⁵ This is an example of a numbering system. Again, any system is fine as long as it's consistent.

¹⁶ Try to use the date format YYYY-MM-DD (or YYYY-MM or YYYY) as it is universally readable by people and machines.

Appendix 6: Example of cataloguing a physical collection.

The [Volunteer Organisation] Archival Collection is located in [Office Space Address]

The Collection is contained in [Number] boxes. These are labelled:

ARCTE001: Training and Education

ARCEV001: Events Publicity

ARCMR001: Merchandise Design

ARCBO001: Board Meeting Minutes

The Training and Education box contains two folders. These are named:

ARCTE002: Training

ARCTE003: Education

ARCTE002: Training contains 2 documents. The metadata for these is:

Code¹⁷: ARCTE002_01_date

Name: Training document 1

Creator: Organisation 001

Description: Summary of Organisation training programme for 2017

Contributor: [Name of training facilitator]

Date: 2017-07 [July 2017]

Type: Training documents

Format: Paper

Rights: Organisation Name; Facilitator name

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Code: ARCTE002_02_date

Name: Training document 2

[and so on]

¹⁷ Equivalent to Filename in the digital collection example.

Appendix 7: Example of top-level collection cataloguing.

If you have less time, and the material in the collection has a lot of the same metadata, you can catalogue metadata at a higher level, like this: (This example describes a digital collection, but this approach works for both physical and digital collections.)

The [Volunteer Organisation] Digital Collection is located on [Organisation] cloud storage account and mirrored on [Organisation] hard drive.

The Digital Collection has 9 top level folders. The metadata for these is:

Names/codes of folders: ARC001 through to ARC009

Creator - [Organisation name]

Date range of material in folders: 2012-03 to 2019-10

Rights and licensing:

Rights: [Organisation Name].

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Description: Summary of content of each folder. (e.g. 'The Events Publicity folder contains 5 JPEG files and 2 PDF files. The JPEG files are posters for the following events [Event names and dates]. The PDF files are press releases for the following events [Event names and dates].')

Developed by the Archiving the 8th project and Archiving Reproductive Health at the Digital Repository of Ireland

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