



COLUMBUS-LOWNDES
PUBLIC LIBRARY SYSTEM

PROCESSING MANUAL

Local History Department
Columbus-Lowndes Public Library System

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Chapter 1: Introduction

Created in the Columbus-Lowndes Public Library System around 1962, the Local History Department (LHD) is charged with the mission of documenting the history and culture of Columbus and Lowndes County. The LHD consists of two main sections: The Billups-Garth Archival Room and the Margaret L. Buckley Genealogy Room.

This processing manual, originally created in 2010 (updated 2014 and 2024), is intended to focus on the consistency of the arranging, describing, and cataloging practices in the Billups-Garth Archival Room. The manual also brings consistent processing practices to the division for the first time. In today's automated environment, descriptive practices should be consistent so that online cataloging records and finding aids are helpful to users.

The manual also serves as a reference source for the division's student employees, volunteers, and new hires assigned archival responsibilities.

The author of this manual realizes that it is an organic document, one subject to change and revision as archival practices shift and new methods and technologies are introduced. What probably will not change are the underlying assumptions the author brought to the manual's writing.

The reader should be aware that these assumptions include the following:

1. The ideal level of processing is not the same for every collection. It is the processor's responsibility to determine the most practical processing scheme.
2. The research value of each collection should determine its level of processing.
3. The archival principles of provenance and original order should determine arrangement.
5. The manual is designed as a guide. It cannot answer every question or consider every possibility in the archival enterprise. Processors with questions not addressed in the manual should consult their colleagues on the staff or in the broader archival community.
6. The overall goals in processing are to preserve the material with enduring value in the collection, arrange the collection in a logical way, describe the arrangement in a well-written finding aid, and make sure all appropriate forms are completed.

The LHD is committed to providing effective access to its holdings and actively encourages its collections be used. To provide the best possible service to users, it is important that as many of our collections as possible be processed, open, and available for research. This manual is designed to assist the staff of the LHD in this effort.

Chapter 2: Basic Principles of Processing

Archivists over the years have formulated a few basic principles to help guide them in their work of arranging and describing collections. These principles are provenance, the sanctity of original order, and the concept of levels of control.

1. **Provenance.** Simply defined, provenance means that the archives of a given records creator must not be intermingled with those of other records creators. Archivist Fredric Miller has said that "provenance is the fundamental principle of modern archival practice." It is important to understand that provenance is identified primarily with the creator rather than the donor, if the two are different. For example, if Jane Smith donated the papers of her grandmother, Sarah Norton, the papers would be the Sarah Norton Papers because she created them.
2. **Original Order.** This principle states that records should be maintained in the order in which they were originally kept while in active use. It is not the order imposed on the material by someone who was not involved with the records while they were in active use. If the order has been destroyed over time or in the transfer/packing process, then it is the archivist's obligation to reconstitute it if possible. If the original order of a collection cannot be discerned or if the original order was capricious and incomprehensible, then the archivist must impose a reasonable and logical order on the collection.
3. **Levels of Control.** The concept of levels of control is not a theoretical principle, but rather a way of implementing provenance and original order in the management and processing of records. Perhaps best explained by Oliver Wendell Holmes, the concept recognizes that most modern archival work involves progressively grouping and describing sets of records along a continuum, going from the largest and most general to the smallest and most specific. Not all collections need to be arranged and described at the same level. The collection's size, research value, basic structure, and other factors will dictate the level to which it should be arranged and described. The various levels of control are:

a. *Collection Level:* Generally, small collections (collections consisting of two manuscript boxes or less), more than large ones, lend themselves to a single arrangement and only a collection-level description. Single items maintained as discrete collections, such as a diary, ledger book, scrapbook, etc., also should be described at only the collection level.

b. *Series Level:* A series consists of records which have been brought together in the course of their active life to form a discrete sequence. This sequence may be a discernable filing system (arranged alphabetically, chronologically, numerically, topically, or some combination of these) or it may be a grouping of records on the basis of similar function, content, or format. For collections with no apparent order or discernable former order, the archivist may create series based on the same considerations--chronology, topics, function, and record type. In any case, the series level is probably the most important one in arrangement because here the archivist expresses the character of the collection by the series into which it has been divided. For the most part, processing depends on establishing series for collections or uncovering the series that the records creator used. Moreover, the series cannot be isolated before the archivist has studied

the entire collection. After the series have been established in a collection, the archivist then arranges the series by placing the most important one first, followed by the other series in descending order of importance. **A series may also be divided into subseries based on form, record type, physical class of the records, or filing arrangement.** See diagram at the end of this chapter for examples of subseries.

c. *File Unit Level*: A file unit is an aggregation of documents brought together, usually for convenience in filing, in such a way that the documents may be treated as a unit. File units are often placed in chronological sequence when they document a regular activity, such as minutes of meetings. The order may be alphabetical when the units document programs, topics, organizations, or people; for example, case files arranged by the name of the client or correspondence arranged by the name of the individual to receive the letter. The arrangement of file units may also be by some internal classification system, usable only if the archivist can find a key or codebook to the system. Also remember that not only do the file units themselves have to be arranged according to some logical plan, but the individual documents within each unit must also be logically arranged.

d. *Item Level*: An item is a single document or manuscript within a collection. The smaller, or more important, or more disheveled the collection, the more likely is the archivist to work it item by item. Single items are placed together in file units. Generally, items in files have either a chronological or alphabetical arrangement. For example, if one has a series of correspondence, arranged alphabetically in file units by the name of the individual to whom the correspondence is addressed, then the letters in each file unit would probably be arranged in chronological order. While archivists sometimes have to handle and arrange every item in a collection, it is extremely rare that they describe a collection at the item level, unless the collection is very small or very important. Time constraints restrict the description of a collection at such a minute level.

Chapter 3: Accessioning

Incoming archives and manuscript collections are accessioned to obtain basic intellectual control over the material.

The decision to accept a collection is strictly made by the Archivist. All accessions must be approved by the Archivist.

Each addition to the Billups-Garth Archival Room should be accessioned as follows:

1. Each donation to the Local History Department must have a signed Deed of Gift form (See example at the end of this chapter). This should be completed upon acceptance of the material(s). Send a thank you letter along with a photocopy of the Deed of Gift form to the donor.

With each addition to a collection, a new Deed of Gift must be signed. For example, some collections continue to receive additions over a long period of time. Every time the donor brings in materials to add to the same collection, a Deed of Gift must be completed. Therefore, one collection may have several Deeds of Gift in the control file.

If a Deed of Gift form was not completed upon receipt of the materials, mail a blank form to the donor along with a thank-you letter, and self-addressed stamped envelope. Upon its return to the Local History Department, it is signed by the Archivist, dated, and placed in the control file for that collection. A photocopy of the completed Deed of Gift will be sent to the donor.

2. After completing the Deed of Gift, fill out the Accession Form. As you fill out the Accession Form (see example at the end of chapter), the collection should be examined for preservation problems. It is also necessary to record on the form, and perhaps a separate sheet of paper, pertinent facts about the collection and its creator to facilitate the writing of the collection-level description.

Each collection is assigned an accession number. The accession number consists of four digits for the year of accession then a dash, followed by the consecutive number of the accession for that year. For example, the first collection accessioned in 2000 is recorded as 2000-01. This number serves as a location number until processing has been completed and a permanent collection number is assigned.

3. Create a control file for the paper records for each accession and any correspondence pertinent to the acquisition. The tab on the control file should include the accession number followed by the temporary title of the collection (ex. 2010-03: Tom Wilburn Oral History CD's, 2005).
4. Rehouse the collection into acid-free records center boxes, or manuscript boxes, and shelve it with the unprocessed archives by accession number. A box-by-box inventory

may be compiled at this time for large collections. This will be decided on a case-by-case basis.

5. If additional donations are made by the original donor to the collection, fill out a new accession form with a new accession number. This form will be added to the control file on the collection. If the collection is unprocessed, be sure to include the working title of the collection along with both the new and original accession number(s). If the collection has been processed and has an MS collection number, be sure to include that on the boxes that are additions along with the new accession number to maintain the connections between the collections.
6. Any material(s) donated to any branch of the Columbus-Lowndes Public Library System other than the Columbus branch must have a Deed of Gift form and must be approved by the Archivist. The material(s) will be transferred to the Billups-Garth Archival Room vault for preservation and storage. Facsimiles of the material(s) may be created to be stored at the branch if possible.

Deed of Gift Form (Blank):
Side 1 of 2

Columbus-Lowndes Public Library System
Local History Department
Billups-Garth Archival Room

Deed of Gift

Name of Donor _____

Phone number _____

Address _____

Description of Materials:

I, _____, being the legal owner of the material described above, do hereby give the material to the Columbus-Lowndes Public Library System as an unrestricted gift, transferring both legal title and copyright to the library.

Donor Signature

Date

Mona Vance-Ali
Archivist

Date

Deed of Gift Form (Continued):
Side 2 of 2

Columbus-Lowndes Public Library System
Local History Department
Billups-Garth Archival Room

Deed of Gift Addendum

Access Considerations

Separation of Materials

Permission to Display Online (Donor to select below by initialing)

_____The Donor hereby **grants permission** for the Columbus-Lowndes Public Library System (CLPLS) to display digital reproductions of some or all donated items on the Internet to promote scholarship by providing electronic copies for personal study and not-for-profit educational uses. The CLPLS may also apply archival best practices necessary to continuously preserve the electronic copies in appropriate file formats and environments.

_____The Donor **does not grant permission** for the CLPLS to display digital reproductions of donated items on the Internet for use by researchers.

May the library publicize the donation of this collection?_____

May the library use your name to publicize the donation of this collection?_____

Donor Signature

Date

Mona Vance-Ali
Archivist

Date

Deed of Gift Form for Oral Histories:
Side 1 of 1

**Columbus-Lowndes Public Library System
Local History Department
Billups-Garth Archival Room**

Deed of Gift/Oral History Agreement

I, _____, (name of donor), of

_____(address), hereby give, convey, and assign
to the Billups-Garth Archival Room with the Local History Department at the Columbus-Lowndes Public
Library System the tape recordings and transcripts of my interviews conducted on

_____.
I authorize the Billups-Garth Archival Room to use the tapes and transcripts in such a manner as
may best serve the educational and historical objectives of their Department.

In making this gift, I voluntarily convey ownership of the tapes and transcripts to the public
domain.

Donor Signature

Date

Mona Vance-Ali
Archivist

Date

Accession Record Form (Blank):
Side 1 of 2

Columbus-Lowndes Public Library System
Local History Department
Billups-Garth Archival Room

Accession Record

Accession No. _____ Record Group No. _____

Title of Collection: _____

Name of Donor: _____

Address & Telephone: _____

Date of Receipt: _____ Date Accessioned: _____

Provenance: _____

Contents:

___ Textual Documents

___ Sound Recordings

___ Maps/Plans

___ Photographs

___ Books/Publications

___ Ephemera

___ Prints, Paintings, Drawings

___ Film/Video

___ Other (describe): _____

Description of Materials: _____

Accession Form (continued):
Side 2 of 2

Inclusive Dates: _____

Bulk Dates: _____

Volume (approximate): _____

Condition: _____

Acquisition Type:

☐ Donation/Gift

☐ Transfer

☐ Copied Material

☐ Purchase/ \$: _____

☐ Other (specify): _____

Restrictions: _____

Possible Future Additions: Yes _____ No _____

Temporary Location: _____

Preliminary Plans: _____

Notes:

Accessioned By: _____

Date: _____

Chapter 4: De-accessioning

The Local History Department at the Columbus-Lowndes Public Library System may, **under certain circumstances and under carefully controlled conditions**, deaccession material from its holdings. This policy applies only to the deaccessioning of manuscript and archival collections held by the Billups-Garth Archival Room within the Local History Department.

The decision to de-accession a collection is strictly made by the Archivist. All de-accessions must be approved by the Archivist.

Deaccessioning may be carried out for the following reasons:

When material has been transferred to another format, such as microfilm, and the original has no further use;

When material is in a format that can no longer be read and the cost of transferring it to a new format outweighs its historical value;

When a collection no longer meets the needs of the Billups-Garth Archival Room or fits into its on-going collection policy;

When a donor requests that material be returned or sent to another repository and there is no other option.

Material will not be deaccessioned if this action is contrary to any written agreement between the donor and the Local History Department. Reasonable attempts will be made to consult donors when materials are considered for deaccessioning. The Department must also have clear legal title to the materials before they can be considered for deaccessioning. This policy does not pertain to ordinary functions of collections management, such as the routine weeding of archival and book collections or the sampling of material according to accepted archival practice.

Procedure

The deaccessioning procedure begins when a request to deaccession material is made by a donor or a department staff member. All requests to deaccession material shall first be made to the Archivist. If the Archivist feels that deaccessioning is appropriate, the collection can then be prepared for deaccessioning.

Evaluation of materials

Before deaccessioning materials with substantial research or financial value, consider the following questions:

Does the Local History Department have clear legal title to the material?

Does the material fall within the scope of the current collection development policy?

Is the material a duplicate or does it duplicate information already held in collections in another format?

Has the material deteriorated beyond real usefulness?

Is the material usable in its current format; if not, would it be cost effective to reformat it?

Do any externally imposed restrictions, such as donor agreements, Local History Department policies/procedures, federal/state law or government depository arrangements, apply to the material?

How would deaccessioning the material affect public access to information?

Each collection in the Billups-Garth Archival Room should be de-accessioned as follows:

1. After a collection has been examined and it is decided to no longer fit the mission of the Billups-Garth Archival Room, a **De-accession Form** is completed (See example at the end of this chapter). This will be signed by the Archivist and included in the collections control file.
2. While a collection is being de-accessioned, it must be determined what will happen to the material. Often, the Deed of Gift will stipulate where or to whom the material should go. If there is no Deed of Gift or if original ownership cannot be determined, the material should first be offered to another repository whose mission better fits the collection. If one agrees to accept the material(s), a **Transfer Agreement** form is completed (See example at the end of this chapter). Have the individual legally responsible for the archives at the receiving institution sign the form. Include the original in the control file on the collection and mail a photocopy to the receiving repository.

If no repository wishes to accept the material(s), the Local History Department Archivist may de-accession the collection as he/she sees fit.

3. The record group number associated with the de-accessioned collection is not to be reused for any other collection in the future.

Disposal of deaccessioned material

Deaccessioned material may be disposed of in the following ways:

- It may be returned to the donor.
- It may be transferred to another more appropriate institution.
- It may be destroyed.

The method of disposition will be determined by the Archivist and, if necessary, the Library Director.

Once a collection has been deaccessioned, the Local History Department will keep in its control files a permanent record of its disposition along with all relevant documentation about it.

De-accession Form (Blank):
Side 1 of 1

Columbus-Lowndes Public Library System
Local History Department
Billups-Garth Archival Room

De-accession Agreement

Accession Number: _____ Record Group No.: _____

Name of Donor: _____

Date of Acquisition: _____

Description of Materials: _____

Reason(s):

- ☐ Yes ☐ No The material(s) is no longer relevant and useful to the functions and activities of the archives
- ☐ Yes ☐ No The material(s) will receive more appropriate interpretation, maintenance, or preservation by another institution
- ☐ Yes ☐ No The material(s) has deteriorated or been damaged beyond usefulness or repair
- ☐ Yes ☐ No The material(s) is made of hazardous materials or is actively decomposing in a manner that directly affects the condition of other artifacts or the health and safety of employees or other persons
- ☐ Yes ☐ No The material(s) is duplicated by another artifact in the archives permanent collection

Method of Disposal:

____ Returned to donor

____ To be destroyed due to inherent vermin or vice

____ Other _____

Mona Vance-Ali
Archivist

Date

Transfer Agreement (Blank):
Side 1 of 1

Columbus-Lowndes Public Library System
Local History Department
Billups-Garth Archival Room

Transfer Agreement

Name of Recipient: _____

Phone Number: _____

Address: _____

Description of Materials: _____

The Local History Department at the Columbus-Lowndes Public Library System, being the legal owners of the following property, do hereby give the materials to _____ as an unrestricted gift, transferring legal title to the above organization or individual.

Recipient Signature

Date

Mona Vance-Ali
Archivist

Date

Chapter 5: Arrangement

Arrangement is the process of organizing archival and manuscript material in accordance with accepted archival principles. The two basic principles are provenance and original order. Provenance means that records from one creator or one donor cannot be intermingled with records from another creator or donor even if the subject matter is the same. The principle of original order requires that materials in a collection be kept in their original order whenever possible. The order of the records reveals information about the creator of the collection and how the documents were used and about the relationships between the files themselves.

The most important factor in determining the overall amount of work to be done on any collection is its research potential. This potential research value should be determined in consultation with the Archivist.

Arrangement of a collection consists of the following steps: research on the collection (if possible), survey of records pertaining to the collection, formulation of a processing plan, physical arrangement, processing and rehousing of materials, and labeling of file folders and boxes.

A. Research

Before work can begin on processing a collection, it is helpful to know as much as possible about the subject of that collection. One should assemble source material, which will reveal as much as possible about the organization, individual, or family who created, received, or used the material. Always add this material to the control file on that collection.

If the collection consists of personal papers, try to obtain a biography of that person, find out the dates of important events in that person's life, or determine noteworthy activities the person was engaged in. If the collection consists of the records of an organization, obtaining information may be more difficult.

Check the holdings of the library for a history of the organization or for oral history interviews with members of the corporate body. If the sources mentioned above are not available either for an individual or for an organization--which is frequently the case--information will have to be obtained from the collection itself. The types of documents that are particularly useful for this purpose are resumes, obituaries, newspaper clippings, diaries, correspondence, annual reports, minutes, and charters.

B. Survey

It is very important to examine all records pertaining to a collection before processing begins. **REVIEW THE DEED OF GIFT AND THE CONTROL FILE!!!**

The processor should first check the Deed of Gift to see whether any restrictions apply to the use of the collection. Correspondence in the control file should be read to learn whether there are special instructions from the donor regarding the disposal of material in the collection (such as duplicates) or other matters. Accession records will also provide information on the exact size of a collection so that no boxes will be overlooked when the collection is moved from the storage area to the processing area. One should also check to see whether any additional collections were donated by the same donor or if there are other collections relating to the same topic or individual in the collection. **MAKE SURE YOU HAVE ALL ACCESSIONS TOGETHER FOR ONE COLLECTION!!!**

After this basic information has been obtained, the collection should be assigned the title, which is a combination of the creator's name plus one of the following terms: papers, records, or collection. Ordinarily collections are named for the person or organization that created the records, not for the donor.

The title of a collection is determined usually by the creator. For example, if the material was created by a person, the collection is titled "papers." If the material was created by an organization, the collection title is "records." If the material was artificially formed around a particular subject, person, or by a collector, the collection is titled "collection." If the entire collection is made up of only one document type, it can be titled more specifically, for example, "photographs," "minutes," and so forth. (For information on determining the correct collection title, refer to the chapter on Description under "Descriptive Summary for Finding Aids".)

C. Processing Plan

With the preliminary work completed, the archivist is ready to devise a processing plan. Use the Arrangement and Description Work Plan to assist with this step (See example at the end of this chapter). This will be included in the collections control file once completed.

The first task is to obtain an overview (or inventory) of the collection. This is best done by setting the boxes on a table (or tables), opening each box, and quickly examining the contents of each box. Then, prepare a careful box-by-box contents list. **MAKE NOTES WHILE SURVEYING THE COLLECTION!!**

Scanning the actual contents of a collection accomplishes several purposes. It helps the archivist to become more familiar with the collection and to note either mentally or on paper the logical sequence of the records and eventually to work out a plan for arranging the material. It also provides the archivist with many clues as to the task that lies ahead: Are file folders neatly arranged, are they poorly arranged, or are there no file folders? Do the folders have labels? Do folder titles reflect the contents? Are the papers in the folders in order? Are they folded? Are there few or many newspaper clippings, reels of film, photographs or fragile documents or artifacts that will require special attention? Is there any evidence of mildew, insect, or rodent damage? Are there oversize documents, government documents, books, or other materials in the collection that may have to be handled separately or transferred to other areas of the library?

Although these problems will be addressed later by the processor, they are nonetheless considerations that must be factored into the final decision on how the collection is to be arranged.

D. Physical Arrangement

The primary task of the processor is to discover the creator's file order and to ensure that it is systematically implemented. It bears repeating that a basic rule of archival management is that ideally the original order of the materials in a collection should not be altered or should be altered as little as possible. All too frequently, however, collections do not arrive in good order or sometimes have no order whatsoever. In these instances, the archivist can impose order on the materials so that they will be easily accessible to the researcher.

1. Arrangement analysis

- a. Current/proposed arrangement
Evaluate the current arrangement of the collection. Are the files in alphabetical, chronological, numerical, or some other order? What is the proposed arrangement of the collection?
- b. Multiple series
Does the collection contain more than one type of record series? If possible, try to list the series that the collection will be divided into and then possible subseries.
- c. Records accessibility
What level of arrangement will be needed to make the records accessible for public use? Minimum: if the records are in suitable order. Medium: if the records have some order, but still needs some arrangement. Maximum: if records have no arrangement scheme.
- d. Propose level of arrangement
To what level will the collection be arranged? To determine the level of arrangement, the archivist must weigh the desired level of intellectual control against the physical labor necessary to achieve that control. Physical arrangement and intellectual control should not always be viewed as synonymous tasks. A more elaborate description may lessen the amount of physical arrangement, just as a very detailed organization may lessen the description required. In some instances, levels of arrangement are also tied to some preservation processes.

There are four basic methods of arranging archival and manuscript collections:

1. Alphabetically by topic
2. In series by document type
3. Chronologically
4. In series by function of the creator

2. Series/Subseries

To establish intellectual arrangement, start by arranging the materials into series. A series is “a group of similar records that are arranged according to a filing system and that are related as the result of being created, received, or used in the same activity” (SAA Glossary). A subseries is a series within a series. The following are typical examples of series arranged hierarchically:

- Series I: Minutes, 1982-2005
- Series II: By-Laws, 1979-2004
- Series III: Correspondence, 1977-2005
 - Subseries i: General Correspondence, 1977-2001
 - Subseries ii: Correspondence on Board Members, 1982-2005
- Series IV: Studies and Reports, 1972-2004

Tips:

- Series are not required in processing. However, large collections will benefit from series arrangement.
- It is often easiest to start with the largest series first. Organize series by hierarchy or importance, with the most important series first and the least important series last.
- Other common ways to establish series include: time frames, correspondence, organizational records, school records, formats, etc.
- Do not create an “Oversize” series.
- Keep arrangement simple and uncomplicated; do not overcomplicate the system of arrangement.
 - Subseries should be established only when necessary.
 - Do not create sub-subseries. They are not best practice, and they complicate a collection’s arrangement. If you find yourself creating sub-subseries, take a step back and review how the series list can be simplified.

3. Description Analysis

The four levels of arrangement are:

- | | |
|---------|---|
| Level 1 | Collection level: Basic analysis on contents of entire collection; collection was inventoried, labeled, and shelved. |
| Level 2 | Box level: Analysis and arrangement of contents by box, bound volume, or microfilm reel. |
| Level 3 | Folder level: Analysis and arrangement of contents by file folders; collection may or may not be stored in lignin-free folders (acid free) and boxes; extraneous fasteners may or may not have been removed. |

Level 4 **Item level:** In depth analysis and arrangement of contents of collection by item; collection is always stored in lignin-free folders and boxes; fasteners have been removed.

The arrangement of a collection will be determined largely by the size and content of the collection. For example, the file folders in a small collection (two or three manuscript boxes) might be arranged alphabetically by subject. If a collection contains only one or two types of material, it might be preferable to arrange the collection into document types, such as correspondence, minutes, and financial records and thereunder chronologically. Some collections, such as the papers of local politicians, lend themselves to chronological arrangement because the activities of the creator of the records are centered around specific time periods (i.e. terms in office). Very large collections also can be made more manageable if the records are arranged in series, which in turn are arranged chronologically, alphabetically, or by order of importance. Arrangement of records by function of the creator groups together documents that relate to a specific activity of the creator.

Collections that are moderate-to-large in size (five or more manuscript boxes) are usually made more manageable by dividing the materials into series. For example, the papers of an individual might require a separate series for personal records, business records, and political records. The records of an organization might be divided into the different components of that organization, such as Department of Equal Opportunity, Education Department, or Public Relations Department. If a particular document type dominates the collection, the series could be formed around those record types, such as correspondence, financial records, minutes, personnel applications, grievances, etc.

It is virtually impossible to make a general statement on how a collection should be arranged because each collection is unique, and each one must be evaluated on its own characteristics. After the basic principles governing provenance and original order have been taken into consideration, the primary objective of the archivist should be to arrange the material in the most user-friendly manner possible. Material should be arranged so logically that the researcher can quickly find needed information.

E. Processing, Rehousing, and Labeling

When the plan for arranging a collection has been determined, the task of processing can begin. At this stage the processor works with one file folder at a time.

Careful attention should be given to the physical condition of the documents.

For example:

1. Remove paper clips and rubber bands. Replace with stainless steel paperclips if possible.
2. Replace rusted staples with stainless steel paperclips, if necessary. Remove excess staples.

3. If necessary, remove metal spirals from notebooks or remove pages and discard notebook cover and spirals. Photocopy cover onto acid-free paper if it contains needed information.
4. Flatten folded documents. If a document is too large for a legal-size folder and too valuable to remain folded, transfer to an oversize box.
5. Place photographs and negatives in polyester or polypropylene sleeves or in acid-free envelopes.
6. Place a sheet of bond paper on each side of documents on colored paper (such as labor union handbills or yellow carbon copies) to prevent staining of adjacent documents.
7. Encapsulate fragile documents or place in polyester sleeves.
8. Trim newspaper clippings and photocopy them onto acid-free paper. Discard the original clipping.

This is also the time to discard duplicates and to decide whether those records with little value should be retained (See "Functional Categories of Records Grouped by Relative Importance" at the end of this chapter). Envelopes are often discarded as well (especially from voluminous 20th century collections), although some archivists prefer to file them with their related correspondence. Other documents that should be removed from the collection at this time are copies of periodicals or newspapers that are available elsewhere in the library.

When all concerns have been taken care of, then transfer the contents of the folders to new, acid-free folders and label each folder.

Tips and Tricks:

- Write the headings on each folder with a No. 2 pencil, including the following information: collection, series, record group number, box number, folder number, and folder title and dates.
- Since you will most likely alphabetize by the first word in the folder title—make sure that it conveys the content.
 - Mississippi Power Company annual report
 - NOT: Report of the Georgia Power Company
- Capitalize the first word in each folder. Then capitalize only proper names or titles of works in the remaining folder title.
 - Annual financial reports
 - NOT: Annual Financial Reports
- No punctuation at the end of the folder title.
- Spell out acronyms.
 - American Civil Liberties Union
 - NOT: ACLU
- Limit the use of abbreviations in folder titles.
 - 5th Mississippi Infantry Regiment
 - NOT: 5th MS Infantry Regt.

- Include dates in folder titles, whenever possible. Separate the folder title and the date by a comma.
 - For inclusive dates use the years only (e.g. 1845-1945); for single dates use the year alone (e.g. 1867); or for single items (such as a letter) use the year followed by the month and day (e.g. 1872 December 6).
 - If exact date is unknown, record approximate date span (e.g. c. 1942-1945)
 - For undated material, do not use the abbreviation n.d., rather record “no date” or “undated”.
- If the original folder contains too much material to fit into a single new folder, or if a manuscript of a work is too large to fit in a single folder use [1 of 3], [2 of 3], etc. at the end of the folder title in brackets.
 - *History of Lowndes County*, galley proof [1 of 2]
 - *History of Lowndes County*, galley proof [2 of 2]
- If you have retained multiple copies of a single item, not the number of copies at the end of the folder title in brackets: [2 copies].
- If the item(s) in a file folder are photocopies of originals, convey this at the end of the folder title in brackets: [photocopies].
- Put the folders in archival boxes fairly tight so that all folders stand up straight. Use ½ size box if necessary.
- Ignore articles (a, the, etc.) when filing folders in alphabetical order.
- The record group number, box number, and folder number should be listed in the right-hand corner and divided by a backslash (as shown below).
- If there is more than one series in a box, the folder numbers do not start over with the new series but continue in numerical order.
- Folder numbers start over with number 1 in each new box, even if the series continues from the previous box.
- Be sure to leave enough space in between in each section on the tab to indicate a separation.

Example of File Folder Tab:

Name of Collection Series /Subseries title	Folder Title, date	Record Group #/Box #/Folder #
---	--------------------	-------------------------------

See the front of the accession log for the next collection number. Record this number on the accession form, in the log, on all pertinent records, and on each folder in the collection. Ideally, no more than 50 sheets or 10 photographs should be put in a file folder. The folders can now be transferred from record center storage boxes to acid-free manuscript boxes. They should be arranged in their prescribed order and placed snugly in the manuscript box. Folders should not be

stuffed into the box so that they are difficult to remove, nor should they be so loosely packed that in time the material will slump and bend. At this time the archivist may begin writing the container list.

Temporary labels can be clipped to each manuscript box while it is being processed, but later when the processing has been completed and the finding aid written, permanent labels should be typed and affixed to each box. These labels should include the name of the institution (Billups-Garth Archives), collection number, collection name, and box number out of total number of boxes in the collection (e.g. Box 1 of 20).

Example of box label (sticker):

Billups-Garth Archives
MS 440
Thomas L. Wilburn Oral History Audio Cassettes
Box 1 of 1

Be sure to place the box label on the upper left-hand side of the base of the box (not the box top).

If the collection, or a portion of it, is housed in an oversize box, the box label should indicate the name of the institution, collection number (including the abbreviation OV for Oversized), the collection name, and the number of boxes in the collection (see examples at the end of the chapter).

Example of box label (sticker) for oversized collection:

Billups-Garth Archives
MS 387 OV
Lowndes County Newspapers
Box 5 of 10

F. WEEDING

Weeding requires the appraisal of each item. Remember that a collection may contain a variety of materials which do not add to its research value. Weeding can take place at several points during processing.

Materials that have been weeded from a collection with the approval of the archivist should be placed in a discard box for deaccessioning. Do not discard weeded materials in the office trash (See “Functional Categories of Records Grouped by Relative Importance” Chart for list of suggested levels of research values for various materials).

NOTES

By the time the finding aid is completed, the archivist will have worked with the material in each folder in the collection several times. It is a good idea to develop the habit of taking notes on the collection during these processing procedures. The notes will be useful to the archivist later when preparing the description of the collection. They should include information on the earliest and latest dates of the records in the collection, on each series within the collection, dates of and facts about important events, the purpose and history of an organization, biographical information, a record of name changes (of an organization), and when the changes occurred, and any other information about the collection that would be helpful to the researcher and to the cataloger. Any notes should be put into the control file on that specific collection when finished.

Arrangement and Description Work Plan

➤ COLLECTION-LEVEL ANALYSIS

Collection number: _____

Creator: _____

Title statement: _____

Date span: _____

Extent: _____

Collection history:

Restrictions:

Yes_____ No_____

Comments:

Disposition of duplicates:

Return to donor_____ Shred_____

Disposition of unwanted materials:

Return to donor_____ Shred_____

Comments:

Arrangement:

Multiple series?

Yes_____ No_____

Description:

➤ SERIES-LEVEL ANALYSIS [DUPLICATE FOR EACH SERIES]

- **Series Title:**
- **Arrangement:**

Current:

☐ Alphabetical
☐ Chronological
☐ Numerical
☐ By record type
☐ Other: _____
☐ No arrangement

Proposed:

☐ Alphabetical
☐ Chronological
☐ Numerical
☐ By record type
☐ Other: _____

Comments:

- **Proposed level of arrangement:**

☐ Collection level ☐ Box level ☐ Folder level ☐ Item level

Comments:

- **Proposed level of description:**

☐ Collection level ☐ Box level ☐ Folder level ☐ Item level

Comments:

- **Preservation concerns:**

- **Proposed preservation during processing:**

☐ Rebox
☐ Refolder
☐ Flattening
☐ Hardware removal
☐ Unbind postbinders/looseleaf notebooks
☐ Sleeve photographs
☐ Other:

- **Processing Time:**

- **Decisions:**

➤ Estimating Processing Rates

OPTION 1

Processing Rate A (40 hours per linear ft.)

Used for collections that are described at the item or virtually at the item level.

Processing Rate B (30 hours per linear ft.)

Used for collections that have little or no arrangement and order. Different kinds of materials are mixed together, correspondence is unsorted or stored in original envelopes, some paper and correspondence are unidentified, and extensive preservation work may be required.

Processing Rate C (20 hours per linear ft.)

Used for collections that have an average number of problems. Papers may have some order and sections of the collection may be properly stored, although significant portions will have to be arranged and a good deal of interfiling work will have to be done. Most collections can be processed at this rate.

Processing Rate D (10 hours per linear ft.)

Used for collections that have no significant organizational problems. A minimum amount of interfiling and reorganization is needed. The major portion of staff time will be expended on the basic work required for all collections: re-boxing, re-folding, listing, and describing the contents of the papers. Records of organizations and collections that consist primarily of manuscripts of published works often fall into the D category.

A preliminary analysis of a collection may indicate that the degree of processing difficulty may fall between two categories. Thus:

Processing rate A/B (35 hours per linear ft.)

Processing rate B/C (25 hours per linear ft.)

Processing rate C/D (15 hours per linear ft.)

Total processing time is determined by multiplying the estimated linear footage by the processing rate.

Example: 4.5 linear ft. x 20 hours per ft. = 90 hours

OPTION 2

Type and Date Range of Record per Cubic Foot

Full processing (includes flat-filing, arrangement, description, foldering, and boxing)

Pre-1800 Personal Papers 9 days

Pre-1900 Personal Papers 5.5 days

Post-1900 Personal Papers 3.5 days

Pre-1800 Business 4.25 days

Pre-1900 Business 2.75 days

Pre-1800 Local Government	7 days
Pre-1900 Local Government	4.5 days
Post-1900 Local Government	2.25 days

Pre-1800 Mixed Types	8.5 days
Pre-1900 Mixed Types	5.5 days
Post-1900 Mixed Types	3.25 days

Re-boxing only (includes labeling) six (6) minutes.

Re-folding only:

Per folder 2 minutes

Per box 5 to 6 hours

Option used:

Estimated processing time:

➤ PROCESSING SCHEDULE

Beginning date: _____

Scheduled end date: _____

Actual end date: _____

Staff assignment: _____

Submitted by: _____ Date: _____

Approved by: _____ Date: _____

Notes:

Common Arrangement Schemes

[Source: Emory University Special Collection & Archives Division]

The following arrangement schemes are offered as a general guideline for the types of records or record series and subseries that are found in different types of manuscript collections. For ease of access, the record types are listed in alphabetical order under each category. When determining the final order of the records, the records can be ordered from most important (e.g. correspondence, minutes) to least important (e.g. printed material, ephemera) or simply in alphabetical order.

For large, complex collections, decisions will also have to be made regarding the internal ordering of each record type. If the collection is small, the records may be arranged in alphabetical order by record type.

PERSONAL/FAMILY PAPERS

- Audiovisual materials (audio and video recordings)
- Correspondence (e.g. incoming and outgoing letters, postcards, letterpress copybooks, telegrams, etc.)
- Diaries/Journals
- Ephemera
- Financial Records (account books, budgets, ledgers, etc.)
- Genealogical records
- Legal documents (marriage/death records, deeds, wills, etc.)
- Organizational files (relating to service on organizations/associations)
- Photographs
- Printed materials (brochures, certificates, clippings, pamphlets, programs, proofs, etc.)
- School records
- Scrapbooks
- Subject files
- Writings (manuscripts, memoirs, reminiscences, reports, research notes, sermons, speeches, etc.)

ORGANIZATIONAL RECORDS

Administrative records	Personnel records
Advertising records	Photographs
Audiovisual materials	Printed Material
Committee files	Public relations files
Correspondence	Subject files
Financial records	
Legal records	
Meeting files	
Minutes	

Arrangement of Specific Record Types

[Source: Emory University Special Collections & Archives Division]

AUDIOVISUAL MATERIALS

When processing the collection, sort AV formats by type and list them using whatever information can be determined from physical examination of the materials or accompanying documentation (e.g. item count, format, title information). Depending on the nature of the content, arrange in chronological order or by the title of the item.

Common types:

- Sound recordings
 - Audio cassettes
 - Reel-to-reel tapes
 - Phonograph records
- Motion picture films
- Video recordings
 - VHS
 - Betacam

CORRESPONDENCE

Common types:

- General correspondence
 - contains correspondence of a general nature
- Family correspondence
 - files consist entirely of (or nearly so) letters between family members
- Personal correspondence
 - is less specific, normally includes correspondence with both family and friends, and generally does not pertain to a person's professional life
- Professional/business correspondence
 - correspondence that principally concerns an individual's professional life or career

DIGITAL MEDIA

When processing the collection, sort digital media formats by type and list them using whatever information can be determined from physical examination of the materials or accompanying documentation (e.g. item count, format, title information). Depending on the nature of the content, arrange in chronological order or by the title of the item.

Common types:

- Floppy discs
- Compact discs (CD)

- Digital versatile discs (DVD)
- Memory cards, flash drives, USB drives, etc.

PHOTOGRAPHS

Usually organized by subject matter, with unidentified items listed at the end of each grouping. Sometimes photographs are organized by type of photographic process, especially when dealing with vintage prints (daguerreotypes, tintypes, cartes de visite, etc.)

Commonly used categories:

- Portraits [of creator]
- Family
- People
 - Identified people
 - Unidentified people
- Places
 - Identified places
 - Unidentified places
- Events
- Publicity photographs
- Photograph albums

PRINTED MATERIAL

Common types:

- Printed material by [creator]
 - Articles
 - Newspaper clippings
- Printed material about [creator]
 - Articles
 - Newspaper clippings
 - Promotional material
 - Reviews
- Other printed material

WRITINGS

Common types:

- Writings by [creator]
 - Notebooks
 - Type of writing
- Writings about [creator]
- Writings by others

ADDITIONAL/OTHER PAPERS [MISCELLANEOUS PAPERS]

Used to classify miscellaneous papers that do not logically belong in any of the otherwise established series or subseries but are being retained. Usually, these papers are arranged alphabetically by type of material.

Insert Sorting Chart here!!!

LINEAR FOOT CALCULATIONS

Note: Needed for all collections of 1 box or more

_____document cases (half)	x 2.5 in. = _____in.
_____document cases (full)	x 5.0 in. = _____in.
_____clamshell boxes	x 3.0 in. = _____in.
_____newspaper boxes	x 12.0 in. = _____in.
_____records carton (letter)	x 12.0 in. = _____in.
_____records carton (legal)	x 15.0 in. = _____in.
_____transfer file	x 24.0 in. = _____in.
_____Oversized (measure shelf or stack)	= _____in.
TOTAL LINEAR INCHES	=_____in./12 in.
TOTAL LINEAR FEET	=_____linear feet

You may also find it online at Yale University's website at

<https://beinecke.library.yale.edu/research-teaching/doing-research-beinecke/linear-footage-calculator>

Estimating Processing Rates

[Source: Beinecke Rare Book and Manuscript Library processing manual]

One of the most difficult tasks archivists face is that of accurately estimating how long it should take to process, arrange, and describe collections of personal papers. The following guidelines may be helpful in making such determinations.

Processing rates vary a great deal from collection to collection. The following guidelines have been found to be both useful and reliable. It must be noted, however, that processing estimates are derived from preliminary examinations of collections of papers. It is always possible, therefore, that complications will be found during processing that were not anticipated at the time of the survey.

In determining processing rates, all time is considered equal (Not all processing requires the expertise of trained archivists, so efficiencies can be achieved by matching tasks to levels of skill and expertise of available staff). Some tasks should only be undertaken by trained archivists, while other tasks like sorting, preservation photocopying, inputting, numbering, and some listing can be done by clerical assistants, students, interns, or volunteers. The greater the expertise of the support staff, the wider the range of duties that can be assigned to them.

OPTION 1

Processing Rate A (40 hours per linear ft.)

Used for collections that have to be described at the item or virtually at the item level.

Processing Rate B (30 hours per linear ft.)

Used for collections that have little or no arrangement and order. Different kinds of materials are mixed together, correspondence is unsorted or stored in original envelopes, some paper and correspondence are unidentified, and extensive preservation work may be required.

Processing Rate C (20 hours per linear ft.)

Used for collections that have an average number of problems. Papers may have some order and sections of the collection may be properly stored, although significant portions will have to be arranged and a good deal of interfiling work will have to be done. Most collections can be processed at this rate.

Processing Rate D (10 hours per linear ft.)

Used for collections that have no significant organizational problems. A minimum amount of interfiling and reorganization is needed. The major portion of staff time will be expended on the basic work required for all collections: re-boxing, re-folding, listing, and describing the contents of the papers. Records of organizations and collections that consist primarily of manuscripts of published works often fall into the D category.

A preliminary analysis of a collection may indicate that the degree of processing difficulty may fall between two categories. Thus:

Processing rate A/B (35 hours per linear ft.)

Processing rate B/C (25 hours per linear ft.)

Processing rate C/D (15 hours per linear ft.)

Total processing time is determined by multiplying the estimated linear footage by the processing rate.

Example: 4.5 linear ft. x 20 hours per ft. = 90 hours

OPTION 2*

Type and Date Range of Record per Cubic Foot

Full processing (includes flat-filing, arrangement, description, foldering, and boxing)

Pre-1800 Personal Papers 9 days

Pre-1900 Personal Papers 5.5 days

Post-1900 Personal Papers 3.5 days

Pre-1800 Business 4.25 days

Pre-1900 Business 2.75 days

Pre-1800 Local Government 7 days

Pre-1900 Local Government 4.5 days

Post-1900 Local Government 2.25 days

Pre-1800 Mixed Types 8.5 days

Pre-1900 Mixed Types 5.5 days

Post-1900 Mixed Types 3.25 days

Reboxing only (includes labeling) six (6) minutes.

Refoldering only:

Per folder 2 minutes

Per box 5 to 6 hours

*These processing times are based on the Lynches article in *The Midwestern Archivist*, Vol. 7, No. 1, 1982.

Functional Categories of Records Grouped by Relative Importance

Note: Varies based on institution

Usually Valuable

Academic record cards	Manuals, policy
Acts, legislative	Manuals, procedure
Addresses	Memoirs
Albums	Memorials
Autobiographies	Messages, official
Briefs	Militia lists
Broadsides	Minutes
Brochures	Muster rolls
Budgets	Newsletters
Bulletins	Orders
By-laws	Organizational charts
Cadasters	Platforms
Calendars	Poll lists
Catalogs	Proceedings
Census rolls	Proclamations
Constitutions	Recollections
Credences	Regulations
Diaries	Reports, annual
Digests	Reports, audit
Directions	Reports, research
Directives	Resolutions
Directories	Rolls
Dockets	Rosters
Elections, certificates, and returns	Rules
Guides	Speeches
Handbooks	Statutes
Histories	Studies
Indexes	Summaries
Interviews	Surveys
Journals, research	Synopses
Laws	Tax returns
Legal opinions	Testimonials
Logs	Wills

Often Valuable

Abstracts	Letters, personal
Agendas	Lists
Agreements	Maps
Announcements	Memoranda
Awards	Monographs
Books	Motion picture film
Cables	Music
Certificates	Negatives, photographs
Charts	Order books
Circulars	Papers, personal
Collections	Pardons
Contracts	Payroll summary cards
Correspondence	Petitions
Course outlines	Photographs
Despatches	Plans
Diagrams	Poems
Disk recordings	Posters
Documents	Publications
Drawings	Recommendations
Field notes	Registers
Files	Reports, progress
Files, personnel	Schedules
Files, research	Scrapbooks
Film strips	Specifications, building
Financial statements	Subject files
Issuances	Tape recordings
Journals	Tariffs
Kinescopes	Telegrams
Ledgers	Videotapes
Letterbooks	

Occasionally Valuable:

Assessment records	Materials	Sketches
Bonds	Nominations	Statements
Cards	Notebooks	Statistical tables

Case files	Notices	Tabulations
Catalogs	Oaths	Tapes, transcribed
Clippings	Payrolls	Transcripts
Committee files	Press releases	
Course materials	Program	
Examination questions	documentation, ADP	
Folders	Property control	
Instructions	listings	
Inventories	Recommendations	
Jackets	Reprints or separates	
Lectures	Returns	
Lists	Schedules	
	Scrapbooks	

Often Without Value

Account books	Outlines
Accounting statements	Payroll deductions,
Addresses, manuscript	authorizations, and
version of published	notices
Applications	Property inventories
Appointments	Purchase orders
Authorizations of	Reading files
actions posted to	Receipts
permanent records	Releases
Ballots	Requests
Bank statements	Requisitions
Bills, financial	Sales literature
Budget work papers	Slips
Cash books	Shorthand notes
Checks cancelled	Speeches, manuscript
Claims	version of published
Classbooks	Tickets
Day books	Tickler files
Invoices	Time books and
Leases	records
Licenses	Trial balances
Manuscripts	Vouchers
Mortgages	Warrants
Notes, lecture	Work orders
Notes, research	Work papers
Orders, financial	Worksheets
Outlines	

Usually Without Value

Duplicate copies
Stencils
Supplies

Chapter 6: Preservation

Preservation is an ongoing activity, performed in the course of accessioning and arranging a collection, or even after arrangement is completed. Most archivists define preservation as the actions taken to stop, prevent, or retard deterioration of archival and manuscript materials as well as improve the condition or change the format to preserve the intellectual content.

Preservation is very time consuming. The sheer bulk of modern records justifies a hard look at the amount of preservation work to be done for each collection. A processor will not do elaborate preservation work. The division's policy is to keep work to a minimum and focus efforts on preserving the information value of records rather than preserving documents as artifacts. Custom housings or extensive repairs should only be undertaken for special items by a trained staff member or outside conservator. The following procedures are undertaken to insure the proper housing and preservation of a manuscript or archival collection.

A. Housing the Collection

Transfer all material to acid-free folders and boxes. All folders should be the same size as the box. To accommodate the most common sizes of paper, store documents in legal size folders in legal size boxes.

Unfold any documents that have previously been stored folded or rolled. Take letters out of envelopes. Keep envelope with letter if the envelope provides information not available on letter (ex. Date and place of where letter was sent). These should be clipped together.

Folders are designed to house from one to fifty or more items. How many documents are stored in a folder is a matter of judgment and depends on their age and importance. Folders that house very old manuscripts have as little as one or as many as fifteen documents. Archival collection folders will accommodate up to one-half inch of material comfortably. More than a half inch of documents is unwieldy and in time possibly damaging to the contents of the folder. Crease the folder along the proper scoring line according to the bulk of the contents so that the folder rests on its flat edge in the document box. A folder with only a few items need not be creased. Use your judgment.

Document boxes should not be overfilled so that the box bulges and files are difficult to retrieve. However, neither should a box be under filled so that the contents buckle or slump. Use a half-size document box for small collections or for housing materials of less than two and a half inches in bulk at the end of a collection.

B. Oversize Material

Oversize documents and other items (above 8 1/2" x 14") will not fit into a legal-size document box when unfolded or encapsulated. Examples are legal or financial documents, muster rolls, certificates, diagrams, photographs, scrapbooks, albums, posters, galley sheets, etc.

Items in this category are stored flat in large flat, acid-free document boxes or in an acid-free folder sized to fit the box or oversize drawer.

Use a box that will accommodate the largest document. If necessary, cut folders to the size of the box, even though items going into the box will be smaller. Separate the oversize box from the collection and place it in the shelving area reserved especially for oversize box storage when processing is completed. A unique box number is assigned to all oversize boxes. (See the Arrangement chapter for labeling of oversize boxes.) Materials transferred to an oversize box should be listed on the inventory in a separate series with the oversize box numbers noted.

Oversize bound volumes are not usually stored in a box with other documents or photographs. If they are heavy enough to shift, they will cause damage to the other items. Old volumes with leather bindings should be wrapped in acid-free paper, spun polyester, or mylar and boxed together if the bindings have red rot.

Smaller bound volumes such as diaries, journals, albums, scrapbooks, etc., which are no more than a half inch thick can be stored in an acid-free folder or envelope. It is acceptable to store such items spine down in document boxes without folders if necessary. They may be wrapped individually in mylar or acid-free paper depending on condition. A label can be attached to the mylar or paper covering.

C. Contaminants

Collections are usually received with one or more types of contaminants attached to some of the papers. Rubber bands, ribbon, twine, and plastic folders should be removed from the materials. Metal paper clips, brads, rusty staples, metal spirals in notebooks, fasteners of any type, or metal straps which rust and damage paper should be removed. A wire cutter is useful in cutting the spirals from notebooks.

Put notebook contents in a folder and discard any blank pages. Metal fasteners may be replaced with plastic coated paper clips or stainless-steel staples. A safer alternative is to place previously fastened pages loose in a separate file folder, or in a folder with other items but separated by a sheet of acid-free paper on each side. A note can be written in pencil on the top sheet to describe the content or number of pages that were originally fastened.

In very large archival or manuscript collections, staples, which are not rusting do not have to be removed. Staples do not rust as quickly as paper clips, and they can be replaced if or when time allows with stainless steel staples.

Cellophane tape, masking tape, and rubber cement or glue cause great damage to documents. They discolor with age and leave permanent stains. Removal from documents is difficult and time consuming and should not be attempted by a staff member without expertise or without consultation with a trained conservator. If the document is old or valuable, it might be worthwhile to attempt tape removal. Otherwise, it is best to leave the item alone, isolate it, or

construct custom housing for it to avoid causing more damage, which may result from the attempt to repair it.

Avoid the use of post-it notes on any item of known permanent value, such as material entrusted to archival care. Aging tests indicate that the note's color tends to transfer to the sheets on which the notes are affixed. Adhesive residue from the note may remain on the sheet after the note is removed. Attempts to rub off the residue will do more harm than good, as the adhesive becomes further embedded in the substance to which it has been attached. Use of these self-stick notes should be limited to non-valuable, non-archival materials. Strips of acid-free paper may be used in place of post-it notes for most archival processing needs.

D. Paper

Newsprint, manila paper, and construction paper are extremely acidic. They darken with age, become brittle, and stain any papers with which they come in contact. Documents printed or written on highly acidic paper include newspaper clippings, telegrams, carbons, copies on thermofax paper, and school writing tablets.

Text on highly acidic paper should be photocopied onto acid-free paper. However, quantities of newspaper clippings of secondary importance, for example, would be too time-consuming to photocopy. Separate the clippings from other paper documents into their own folders. Photocopy any item that is badly deteriorated or on poor quality paper. Letter size, legal size, and oversize acid-free paper is available. Discard the original item unless it has value as an artifact, for exhibition, or is handwritten. Such items are encapsulated in mylar with a sheet of acid-free paper as a neutralizing backing. Sometimes a photocopy of a brittle encapsulated item is also made, and researchers are encouraged to use it instead of the original.

If original document is too dark or faded so that a clean copy CANNOT be made, the item may need to be transcribed. Transcribe the document(s) and then write on transcription(s) "TRANSCRIPT FROM ORIGINAL".

E. Photographs, Audio Tapes, and Films

Photographs mounted on acidic pages of an old album or scrapbook, present a special problem. Each album and its contents must be evaluated individually. Albums of this type can be photographed or photocopied page by page to maintain a record of the original historical arrangement and descriptions. The photos can then be removed and stored in separate folders or envelopes. Often the best solution is to interleave the pages with acid-free paper between the pages to neutralize the harmful effects of the original pages and keep the item intact. If the album cannot accommodate the bulk added by protective sheets, unbinding may be required. Loose sheets can then be boxed.

Photographs, oral history tapes, films, video tapes, and artifacts should be separated from the paper part of the collection and stored in separate folders, series, or document boxes so that their unique formats may be accommodated. All sound recordings, videotapes, films, etc. should be

duplicated if possible. A master copy is made from the original from which use copies are produced. Use copies will be made available for researchers.

Photographs 8" x 10" and under can be stored either in archival folders interleaved with acid-free paper (non-buffered if they are color or albumen prints), in acid-free envelopes, in albums, or in mylar or polypropylene sleeves or pages designed for storage of photographs. Rolled photographs may be stored rolled if necessary or may be humidified, flattened, and wrapped with an acid-free board support for storage. Negatives and photographs are never stored in the same envelope, sleeve, or folder although they can be stored in the same box.

Slides and photographic negatives should be housed in archival slide and film protectors designed for the individual size and format. Photographs over 8" x 10" and mounted photographs must be stored flat in oversize boxes. Cased photographs, such as tintypes, daguerreotypes, or glass negatives, need custom containers to protect them. Such containers can be made or purchased. They may be protected by wrapping them in tissue paper and storing them horizontally in flat storage document boxes. Microfilm storage boxes are also useful for smaller cased photographs.

When housing a large collection of photographs, put no more than ten photographs or approximately a quarter inch in each folder. This is a general rule of thumb adhered to by most photographic archivists. Interleaving the prints with acid-free paper is optional. However, if the prints are on acidic board, have clippings attached to the verso, or if any kind of transferable marker or ink was used by the original owners to write identifications, acid-free paper should be considered to protect adjacent prints. Fragile prints should be stored in sleeves and filed singly in folders. Very fragile prints should be stored flat with a piece of supporting mat board and a Mylar enclosure. **Consider the value of the material. The more valuable or unique it is, the more carefully it should be housed.**

Photographs stored vertically must be stored in full boxes or in polypropylene pages in a firm notebook to retard curling. Never affix a gummed label on the front or back of a photo. Information about a photo is placed on its verso in pencil and only along its border. Information can be written on a piece of interleaving paper placed behind the photo or on the envelope or folder in which it is stored. Excessive photocopying of photographic prints of any kind should be avoided. Copy prints should be made of frequently photocopied photographic materials.

F. Digital Media [Section F source: University of Massachusetts Boston]

See the Columbus-Lowndes Public Library System Local History Department's Digital Preservation Policies and Procedures for more detailed information.

Store all formats vertically. **DO NOT TRY TO PLAY MEDIA IN A COMPUTER HARD DRIVE.**

See the following format descriptions for specific instructions.

Floppy Disks

- Flip the tab up on the back of the 3.5-inch floppy disk to protect the item from being overwritten.
- Floppy disks may be stored in their original containers or in archival paper envelopes. Write with pencil on the outside of the envelope the collection number, series number, and title from the floppy disk, if available. For a large number of floppy disks, create small stacks, and tie each stack together with a bookbinder's knot and slip of paper indicating the collection number, series number, and title. Store the stacks of floppy disks in a small box.
- If there is there is no original order and the collection consists of a large number of disks, create a floppy disks series or media series if the collection contains multiple formats.

CDs and DVDs

- Make sure that all items have cases. List CDs/DVD/s by group title and total number of items. However, if the title of each CD/DVD is important for researchers and their work, consider creating an itemized list.
- If there is there is no original order and the collection consists of a large number of CDs and/or DVDs, create a CDs and/or DVDs series or media series if the collection contains multiple formats.

Memory cards, USB drives etc.

- Store these items in small archival envelopes. Write with pencil on the outside of the envelope the collection number, series number, and title of item, if available. List items in the container list by format. You may decide to assign each item a unique sequential ID number in case the item gets separated from its box. Write the ID number on the enclosure and on the media itself. Use a CD/DVD pen. Write only on the clear inside hub of the disk.

G. Basic Techniques for Repairing Documents

Simple repairs and conservation steps are undertaken on manuscript and archival materials keeping in mind that any repair should be durable, reversible, but harmless to the item being treated. Consultation with a professional conservator is advised for complicated preservation or storage problems. Learn to distinguish between repairs that you are capable of doing with the equipment on hand and that which is best left to the experts!

1. To remove staples, use a microspatula, especially on old manuscript materials. Bend up the prongs on the verso of the paper group, then lift off the top of the staple at the front of the document with the microspatula. Staple removers on modern documents in good condition are acceptable if done carefully.
2. To clean soiled documents, use the powder from a document cleaning pad or cleaning powder. Rub the powder gently in a circular motion with your fingertips. Brush dirt into a waste container. A soft eraser may be used for stray marks. Do not use cleaning powder on documents written in pencil or on chalk drawings. This technique is primarily for soiled printed materials.
3. To flatten curled documents or photographs, place them on the rack in the humidifier. Be sure that there is fresh, warm water in the container beneath the rack. Close the lid

- tightly. Let your document remain in the humidifier for several hours or overnight. Remove documents and place them between sheets of blotter paper under the heavy boards of the flattening table. Leave overnight to dry. Let the blotter paper dry between uses. Thin, soft items will take only a few hours to humidify whereas heavy, rolled materials may take a few days. Check your document each day that it is being humidified. Over humidified documents sag and do damage to themselves and other items in the humidifier from being exposed to too much humidity for too long.
4. **Encapsulation** is used to protect brittle, torn, or fragile but frequently used items. To encapsulate a document, cut a piece of 3 mil mylar at least one inch larger than the document on all sides. Lay one sheet of mylar on a clean surface. Clean the mylar with a soft cloth to remove dust and create a static charge. Place the document at the center of the mylar and use a soft weight on the document to keep it from shifting. Place a strip of 1/4" 3M encapsulation tape along each side of the document approx. 1/8" from the item leaving a gap at the corners. Place the second sheet of mylar on top of the document as you remove the weight. Place the weight on top of the three items and clean the top sheet of mylar with a soft cloth. Reach under each edge in turn and remove the protective paper from the tape, letting the mylar fall quickly in place to seal. Press out the air after removing each piece of tape with a squeegee or cloth to create more static and clean any dust off the mylar. Trim the borders to 1/4" and round the corners.
 5. To kill mold, put the document in the sun for several hours. When mold is dry, brush or vacuum it off. Do this outdoors and use a protective facemask and gloves. Mold is dangerous to handle and can cause health problems for anyone who handles infected items. Isolation of the item from other library materials is necessary until a decision is made to reproduce the item and discard it. To remove a moldy odor, place a document in a plastic garbage bag with a small box of charcoal briquettes. Seal the bag and leave it for a week.

For greater detail and more information on specific preservation techniques, consult the recommended works listed below. The above methods are intended to serve only as an introduction to the basic preservation techniques used in the division. What you do depends on your training and the value of the material.

Preservation Bibliography

Archival Storage of Paper. Gaylord Preservation Pathfinder No. 2. Syracuse, N.Y.: Gaylord Bros., 1993.

Archival Storage of Photographic Materials. Gaylord Preservation Pathfinder No. 3. Syracuse, N.Y.: Gaylord Bros., 1994.

Archival Storage of Textiles. Gaylord Preservation Pathfinder No. 5. Syracuse, N.Y.: Gaylord Bros., 1997.

An Introduction to Book Repair. Gaylord Preservation Pathfinder No. 3. Syracuse, N.Y.: Gaylord Bros., 1995.

“CoOL: Conservation Online,” *Foundation for Advancement in Conservation* online, June 19, 2024, <https://cool.culturalheritage.org/>.

Kahn, Miriam B. ***Disaster Response and Planning for Libraries.*** Chicago: American Library Association, 1998.

Lavender, Kenneth and Scott Stockton. ***Book Repair: a How-to-do-it Manual for Librarians.*** New York: Neal-Schuman Publishers, 1992.

Managing a Mold Invasion: Guidelines for Disaster Response. Technical Series No. 1. Philadelphia: Conservation Center for Art and Historic Artifacts, 1994.

“NEDCC Preservation Leaflets,” *Northeast Document Conservation Center* online, June 19, 2024, [NEDCC Preservation Leaflets — NEDCC](#).

Reilly, James M. ***Care and Identification of 19th-Century Photographic Prints.*** New York: Eastman Kodak Company, 1986.

Ritzenthaler, Mary Lynn and Diane Vogt-O’Connor. ***Photographs: Archival Care and Management.*** Chicago: Society of American Archivists, 2006.

_____. ***Preserving Archives and Manuscripts.*** Chicago: Society of American Archivists, 1993.

Tigelaar, Mary. ***Simple Conservation Techniques.*** Text by Mary Tigelaar; illustrated by Charles Colley and Mary Tigelaar.

Archival Supply and Exhibit Companies

Conservation Resources International, Lorton, VA (800-634-6932)

Primarily boxes and folders, photographic enclosures, misc. archival supplies, custom order service.

<http://www.conservationresources.com>

Dickson Company, Addison, Illinois (800-323-2448)

Temperature/humidity recorders and supplies.

<https://dicksondata.com/>

Gaylord Archival, Syracuse, NY (800-448-6160)

Archival Help Line, Th.-Fri. (800-428-3631)

Full line of archival supplies and some bookbinding supplies (15% discount to libraries).

<https://www.gaylord.com/>

Hisco Company, Houston, TX (713-683-2448)

The best deal on Velcro self-adhesive hooks and loops.

<https://www.hisco.com/>

Hollinger Metal Edge Corporation, Fredericksburg, VA. (800-634-0491)

Primarily boxes and folders, misc. archival supplies, custom order service.

<https://www.hollingermetaledge.com/>

Light Impressions, Rochester, NY (888-222-2054)

Primarily photographic storage and framing supplies, includes misc. archival supplies (\$50 minimum).

<http://www.lightimpressionsdirect.com>

LINECO, a division of Filmguard Corp., Holyoke, MD (800-322-7775)

Archival enclosures for photographic materials, darkroom gloves & accessories, factory direct prices.

<https://www.lineco.com/>

United Mfrs. Supplies, Inc., New York, NY (800-795-1589)

Primarily exhibition, framing, and art supplies, good prices.

<https://www.unitedmfrs.com/>

University Products, Holyoke, MA (800-628-1912)

Full range of archival products, volume discount

<http://www.universityproducts.com>

Free catalogs can be requested from out-of-state archival suppliers. See web links for on-line catalogs and information.

Preservation Copying

Preservation copying, or facsimiles, can be achieved through either photocopying or digitizing the original. Digitizing, however, will produce a higher quality duplicate. The subsequent procedures are devised to obtain THE BEST DUPLICATE POSSIBLE.

1. **BE CAREFUL IN HANDLING DOCUMENTS FOR COPYING.** Many of them are very fragile.
 - a. Reassemble folded or torn pieces (if possible). Do not block other areas of the text.
 - b. Carefully remove all staples, paper clips, and other fasteners. If the fastener is not easy to remove, then be very careful copying these documents.
 - c. Anything that presents a problem, which cannot be solved simply and quickly, should be marked in place with a colored sheet of paper and brought to the attention of the archivist.
 - d. NEVER put original documents through a document feeder. Place each individual document on the glass part of the copier, scanner, or overhead camera to make the preservation facsimile.
2. **Maximize Legibility**
 - a. It is important to get the BEST COPY POSSIBLE. If this cannot be done, then consult the archivist. You may need to reformat (i.e. type or scan) the information.
 - b. Adjust either the copier, scanner, or camera settings to provide maximum contrast and legibility. Copies, which are too light or dark, will be difficult for researchers to read.
 - c. Manuscripts can be very difficult to copy if there are comments or corrections in pencil or pen over typed or printed text. Normal exposure settings may make these annotations too light, so adjust the machine until the annotations are as legible as possible.
 - d. Thin paper, such as onion skinned, will require a few sheets of paper placed behind the document to ensure a clearer copy when using a copy machine.
 - e. Use lignin-free cotton fiber or bond paper for all photocopies.
3. **Check for accuracy!!**
 - a. Check every page against the original as soon as it is finished. Check for legibility (dark, light, or fuzzy spots), torn segments, missing lines, etc.
 - b. If there is a problem, do it over again.
4. **Replacing materials in the collection**
 - a. In general, a physical copy of the duplicated material should be returned to the collection behind the originals.
 - b. Always maintain the original order of items in the folders.

Chapter 7: Description

The finding aid is compiled specifically to describe the arrangement and contents of a collection and to comment on its research potential. It serves the researcher seeking information about a person, family, or corporate body; serves the staff in locating desired materials; and serves the donor as a record of material deposited. The finding aid should be written in clear, concise language, in a tone free of value judgments, personal bias, or professional jargon.

Use Microsoft Word, 12-point Times New Roman font, in creating the finding aid and all related documents. The preferred page setup is one-inch margins all around. All Word documents should have the .doc extension.

All completed finding aids **MUST** be reviewed by the department head.

Terminology for Billups Garth Archival Room Vault

Location Codes:

ADR	Artwork Display Rack
CDD	Compact Disc Drawers
CS	Compact Shelves
FF	Flat File Drawers
In vault leaning against wall	Inside Billups-Garth vault leaning against a wall
In Vault	Inside Billups-Garth vault
LH Dept. Wall	Hangs on the wall inside the Local History Department
Margaret L. Buckley Case	Display case inside the Margaret L. Buckley Genealogy Room
OV Shelf	Oversized Shelf (includes Rolling Shelves)
S.M.C.	Small Manuscript Collection, processed
Vertical File Cabinets Top	On top of Vertical File Cabinets inside the vault.

Code for Art Racks

ADR plus the number of the specific art rack within the vault.

Code for Compact Shelves:

First number	Row
Second number	Side
Third number	Range
Fourth number	Shelf

Code for Flat File Drawers:

The abbreviation "FF" for "flat files" followed by the drawer number that the item is located within.

Code for OV Shelves:

First number	Unit
Second number	Range
Third number	Shelf

Cataloging Formats Defined

DACS: Describing Archives: A Content Standard

The format used to catalog archival and manuscript materials.

MARC: MACHine READable Cataloging

A list of standard labels and definitions containing information that describes books, maps, archival collections, etc. for cataloging purposes.

A national and international standard that allows for the exchange of information between different computer systems.

MARC21

The implementation of the MARC format.

**The Billups-Garth Archival Room
Columbus-Lowndes Public Library System**

Descriptive Summary for Finding Aids

BLUE = Required Minimum Elements

GREEN = Elements Likely To Be Used

HEADING

➤ **TITLE (Required)**

DACS: 2.3

EAD: <unittitle>

MARC21: 245\$z (Title Statement)

The title provides a word or phrase by which the material being described is known or can be identified.

Create a title that best describes the material in terms of the creator, type of materials, and subject. When the name of the person, family, or organization predominantly associated with the materials is clearly given as the creator, you may repeat that information in the title.

Avoid ambiguous names and try to standardize titles as much as possible. If an organization is documented by only one collection that contains all the records created by that organization then use the title “records.” If a manuscript collection contains a variety of materials belonging to one individual use the title “papers,” but if it documents several generations of one family use the title “family papers.” If the collection relates to multiple families use the title “families papers.” If the collection has been artificially created by or around an individual or subject, use the title “collection.”

Titles can also be more descriptive if needed (e.g. the collection consists of a single homogeneous record type, etc.).

The title for the heading is written in all capital letters. Also, do not include “The” or “A” in at the beginning of the title.

Example:

AGRICULTURAL SOCIETY OF LOWNDES COUNTY RECORDS

BLAIR FAMILY PAPERS

GIDEON DOWSE HARRIS JOURNAL

➤ **RECORD GROUP NUMBER (Required)**

DACS: 2.1.3

EAD: <unitid>

MARC21: 035 (System control number)

Each collection is assigned a unique number starting with “MS” followed by the collection number. This number represents the order in which the collection was processed in the overall archival collection. Include the record group number directly underneath the title.

Example: MS 414

➤ **NAME AND LOCATION OF REPOSITORY (Required)**

DACS: 2.2

EAD: <repository>, <corpname>, or <subarea>

MARC21:852\$a

The name and location of the repository that holds the materials being described. Both the names of the department and institution are written in capital letters.

Example:

*THE BILLUPS-GARTH ARCHIVES
IN THE LOCAL HISTORY ROOM AT THE COLUMBUS-LOWNDES PUBLIC LIBRARY
314 N. Seventh Street, Columbus, MS 39701*

COLLECTIONS SUMMARY

➤ **CREATOR (Required)**

DACS: 2.6

A description of the context in which the materials being described were created, assembled, accumulated, and/or maintained is as important as the description of the materials themselves. Under the heading of “Provenance” you can identify the primary individual, family, or organization responsible for that process. Whomever creates the bulk of the material is listed as the creator.

Start with the creator’s last name if it is an individual, followed by a birth and death date in parenthesis.

Example:

Personal Name

Gaines, Marion Stark (1850-1942) [added fuller form of name and birth and death dates]

Williams, Sherman, Mrs. [added title or terms of address]

NOTE:

CREATOR vs. TITLE

- The personal papers of an individual
 - *Creator:* Pinckney, Charles, 1757-1824
 - *Title statement:* Charles Pinckney Papers
- The personal papers of two or more individuals, where one of the persons can be considered more prominent, or one person’s papers predominate.

➤ **TITLE (Required)**

DACS: 2.3

The title is repeated in the collection summary section. For this section, however, other than proper names, only the first word in the title statement is capitalized.

➤ **DATE SPAN (Required)**

DACS: 2.4

EAD: <unitdate>

MARC21: 245\$f (Title Statement, inclusive dates) and 245\$g (Title Statement, bulk dates)

This section identifies and records the date(s) that pertain to the creation, assembly, accumulation, and/or maintenance and use of the materials being described.

For inclusive dates use the years only (e.g. 1845-1945); for single dates use the year alone (e.g. 1867); or for single items (such as a letter) use the year followed by the month and day (e.g. 1872 December 6).

If exact date is unknown, record approximate date span (e.g. c. 1942-1945)

If a collection has a large concentration of materials during a particular time period, also use bulk dates (e.g. **Bulk Dates:** 1902-1904).

For undated material, do not use the abbreviation n.d., rather record “no date” or “undated”.

*Example: **Inclusive Dates:** 1830-2004 or **Bulk Dates:** 1891-2004*

➤ **PHYSICAL DESCRIPTION EXTENT (Required)**

DACS: 2.5

EAD: <physdesc><extent>

MARC21: 300

This element denotes the extent and the physical nature of the materials being described. This is handled in two parts, a number (quantity) and an expression of the extent or material described. If necessary, record the measurement of the item. In other words, the finding aid will include both linear feet and the number of various materials.

Give the measurement in inches (i.e. height x width x depth in. or 10 x 11 in.) and round up to the next whole number (i.e. 31.7 in. becomes 32 in.). Also include the width of microfilm as either 16 mm or 35 mm, if applicable.

*Example: **Linear Feet:** 0.67 lf.*

***Extent:** 1 item, 1 journal, 7.5 x 9 x 1.5 (inches), approximately 300 pages*

ADMINISTRATIVE INFORMATION

➤ **CONDITIONS GOVERNING ACCESS (Required)**

DACS: 4.1

EAD: <accessrestrict> or <legalstatus>

MARC21: 506 (Restrictions on Access Note)

Conditions governing access lists any access restrictions due to the nature of the information in the materials, such as those imposed by the donor, by the repository, or by statutory/regulatory requirements.

If there are none, simply indicate “None”.

➤ **PHYSICAL ACCESS (Optional)**

DACS: 4.2

EAD: <accessrestrict> or <phystech> or <physloc>

MARC21: 506

This section provides information about access restrictions due to any physical characteristics or storage locations that limit, restrict, delay, or otherwise affect access to the materials.

➤ **TECHNICAL ACCESS (Optional)**

DACS: 4.3

EAD: <phystech>

MARC21: 538

Technical Access refers to any technical requirements that restrict or otherwise affect access to the collection, such as equipment or specific hardware/software required for use.

➤ **CONDITIONS GOVERNING REPRODUCTION AND USE (Optional)**

DACS: 4.4

EAD: <userrestrict>

MARC21: 540 (Terms Governing Use and Reproduction Note)

This section identifies any restrictions on reproduction due to copyright or other reasons, as well as restrictions on further use of the materials, such as publication, after access has been provided.

Example:

Due to preservation concerns, researchers are required to use the [microfilm copy/photocopy].

Volumes may not be photocopied.

Letters and manuscripts by [name] may not be reproduced without the written permission of [name].

➤ **LOCATION OF ORIGINALS (Optional)**

DACS: 6.1

EAD: <originalsloc>

MARC21: 535 (Location of Originals/Duplicates Note)

This section is used only when the original materials or records are not held by the repository. If the originals are held by another repository, give the name and location of that repository. If the originals are held by an individual or the donor, state who has possession.

Example:

*Originals at the University of Mississippi, J.D. Williams Library, Archives and Special Collections, Oxford, MS.
Originals in possession of donor.*

➤ **IMMEDIATE SOURCE OF ACQUISITION (Required)**

DACS: 5.2

EAD: <acqinfo>

MARC21: 541

The immediate source of acquisition section identifies the source from which the repository directly acquired the materials being described, as well as the date of acquisition, the method of acquisition, and other relevant information.

Example:

Chebie Bateman, granddaughter of Marion Stark Gaines and director of the Columbus-Lowndes Public Library 1961-2004.

Over 120 prints and negatives; including glass-plates negatives, nitrate film negatives, and Kodak safety film negatives; were purchased from the Historic Mobile Preservation Society by the Columbus-Lowndes Public Library on 2008-07-21.

In 2009, Gary Lancaster produced photographic prints of the glass-plate negatives. The purpose of this project was to create printed facsimiles of the glass-plate negatives for use by researchers thus minimizing the use and destruction of the negatives.

The Research series was collected and added by Russell James, Archivist 2004; Ben Petersen, Archivist 2005; and Mona K. Vance, Archivist 2005-until.

➤ **ACCRUALS (Required)**

DACS: 5.4

EAD: <accruals>

MARC21: 584

In the accruals section, the user is informed of anticipated additions to the collection. An accrual is an acquisition of archival materials additional to that already in the custody of the repository.

If none are expected, then indicate “No further accruals are expected”.

➤ **RELATED ARCHIVEAL MATERIALS (Optional)**

DACS: 6.2

EAD: <altformavail>

MARC21: 530

This element indicates the existence, location, and availability of copies or other reproductions of the materials being described when they are available for use in an institution, or for loan or purchase, or available electronically.

DACS: 6.3

EAD: <relatedmaterial>

MARC21: 544

This element indicates the existence and location of archival materials that are closely related to the materials being described by provenance, sphere of activity, or subject matter, in the same repository, in other repositories, or elsewhere.

➤ **CITATION NOTE (Required)**

DACS: 7.1.5

EAD: <prefercite>

MARC21: 524 (Preferred Citation of Described Materials Note)

This element indicates for the citation of the collection being described that is preferred by the custodian of the materials.

Example:

*Researchers wishing to cite this collection should include the following information:
Agricultural Society of Lowndes County Records [Taken from the Title Statement],
Billups-Garth Archives, The Local History Department, Columbus-Lowndes Public
Library, Columbus, MS.*

COLLECTION DESCRIPTION

➤ **BIOGRAPHICAL OR HISTORICAL NOTE (Required)**

DACS: 2.7 or 10

EAD: <bioghist>

MARC21: 545 (Biographical or Historical Note)

The purpose of this section is to provide information about the organization(s) or individual(s) associated in some way with the creation, assembly, accumulation, and/or maintenance and use

of the unit being described in order to place the material in context and make it better understood.

A Biographical Note should include a brief history of the person or family the collection relates to. A biographical sketch of an individual can include:

- Full name, married name, pseudonyms
- Place and date of birth and death
- Formal education
- Place and length of residence
- Occupations or life work
- Marriages and names of children
- Significant accomplishments and achievements
- Important relationships with other people or organizations
- Family relationships, if multi-generational

Example:

Gideon Dowse Harris was born 9 June 1846 in Columbus, MS. He was the son of George Hunt Harris, born March 4, 1809 in Elbert County, GA, and Mary Whitehead Dowse of Bath, GA. He married Elizabeth “Lizzie” Washburn Eagar (1849-1904) on March 6, 1867 by whom he had five children: three boys and two daughters Laura Harris Jacobs (b. 1870) and Elizabeth “Lizzie” Harris Waring (b. 1874).

Harris was a shoe dealer and operated the Lowndes County Shoe Company in 1906. He also owned an insurance business located at 517 ½ Main Street. In 1918, the family lived 408 South Fourth Avenue. Harris also served as superintendent of the Sunday School for the First Methodist Church from 1900-1906.

After Elizabeth’s death, he married Emma Tallulah Fulgham. Harris died on 3 September 1919 and is buried in Friendship Cemetery (Columbus, MS) next to his first wife, Elizabeth Washburn Eagar Harris.

A Historical Note contains a brief overview of the evolution of a business/organization and can include:

- The official name of the organization
- Organizational name changes and when they occurred.
- Location of the organization
- When it was established and dissolved (if applicable)
- Primary functions
- Names of the people involved with the organization (if significant)
- Divisions of the organizations (if necessary)

Example:

The Women's Missionary Society of the First Presbyterian Church was the combination of several auxiliaries dating back to the Ladies Missionary Society founded 19 September 1876. The Ladies Missionary Society made contributions to Thornwell Orphanage in Clinton, South Carolina. The superintendent of the Orphanage was Dr. William Jacobs whose son later became a pastor of the First Presbyterian Church in Columbus. Other works include the education of a girl from China who later became a teacher in Hanchow, China.

Other societies operating alongside the Ladies Missionary Society included the Home Missionary Society, Ladies Aid's who assisted the pastor, and the Society of King's Daughters which worked with the Palmer Home Orphanage in Columbus.

In 1912, all of these societies merged under the heading of Women's Missionary Society. Their mission was "The bonding together of the women of the Columbus Church to study missions both home and foreign. To secure funds for the spread of the Gospel and to use every effort to increase interest in all missionary endeavors, thereby obeying the Command of the Savior to give the Bread of Life to every creature." (Excerpt from the Women's Missionary Society record book dating 1916-1918 within the collection)

➤ **SCOPE AND CONTENT (Required)**

DACS: 3.1

EAD: <scopecontent>

MARC21: 520 (Summary, etc.)

The scope and content note summarizes, in narrative form, the contents of the entire collection. This includes an introductory sentence followed by information on types of records, subjects covered, functions documented, and significant people, events, and places discussed. This is also where one can highlight the strengths and weaknesses of the collection (e.g. date gaps).

- **General introductory sentence**

The collection consists of the papers of Willis Pope Blair from 1890-1895.

The collection consists of materials relating to the War of 1812 collected by John Smith.

The collection consists of records of the Women's Missionary Society of the First Presbyterian Church from 1915-1918.

- **Types of records included**

The papers include correspondence, diaries, printed material, and photographs.

The records include administrative files, minutes, committee records, publicity files, and audio-visual materials.

- **General content**

The collection documents Carolyn Hairston Blair Moorhead Henderson's research on the Blair family.

The records reflect the organization's activities relating to the missionary activities of the church both in Lowndes County and around the world.

- **More specific information regarding the contents of particular types of records, both strengths and weaknesses**

The correspondence includes letters from family members, business associates, and publishing companies.

The writings include both poetry and prose, but do not include any of his short story works.

The diaries reflect the hardships of war including food shortages and camp life but contain little information regarding specific battles.

Example:

This collection consists of seven items relating to the Coffee Shop at the Gilmer Hotel. There are six menus and one placemat. The menus include inserts, historical information and photographs about Columbus, food and price options, and various business advertisements. The menu's range from 1939-1954 with two menus undated. All are original except the menu from 1954 October 17.

The placemat measures 10" x 14" and contains a sketched cartoon map of downtown Columbus with the title "Discover the Old South in Columbus".

➤ **SYSTEM OF ARRANGEMENT (Required)**

DACS: 3.2

EAD: <arrangement>

MARC21: 351 (Organization and Arrangement of Materials)

The system of arrangement section provides information about the arrangement or order of the collection being described.

Example (General):

This collection is arranged in descending chronological order starting with 1938 and going to 1919.

This would indicate whether the collection is organized alphabetically, chronologically, numerically, or some other order.

Example:

Arranged by record type

Arranged in chronological order

Arranged in numerical order by case number

Arranged alphabetically by military unit, and then chronologically

This section would also highlight whether the collection is divided in series or even subseries.

Example:

Organized into three series:

(1) Writings by William Pope Blair

(2) Diaries, and

(3) Correspondence.

Organized into three subseries: (1.1) Poems, (1.2) Prose, and (1.3) Scripts.

Chapter 8: Confidentiality and Access to Records

Access to the collections is controlled not only by the Local History Department access policy and donor agreements, but also by certain legislation affecting privacy or national security.

Donor's Restrictions

Any restrictions the donor wishes to impose on the records are spelled out in the gift agreement. These restrictions are noted on the accession record.

Copyright Law

Requests for a reasonable amount of photocopying may be made to the Local History Department staff member on duty. Title 17, United States Code (Copyright Law) states that PHOTOCOPY OR REPRODUCTION IS NOT TO BE "USED FOR ANY PURPOSE OTHER THAN PRIVATE STUDY, SCHOLARSHIP, OR RESEARCH".

To quote in print, or otherwise reproduce in whole or in part in any publication, including on the Worldwide Web, any material from a collection, the researcher must obtain permission from (1) the owner of the physical property and (2) the holder of the copyright. Persons wishing to quote from a collection should consult the archivist to determine copyright holders for information in the specific collection. Reproduction of any item must contain the complete citation to the original.

Mississippi Code and Privacy

There are state laws governing areas of privacy and disclosure. Among the laws most relevant to this repository are Title 25 of the Mississippi Public Records Act of 1983 and Title 39 of the Mississippi Code on Libraries, Arts, Archives and History.

To find out more information about the Mississippi Public Records Act visit the Mississippi Ethics Commission website at <https://www.ethics.ms.gov/>.

For more information on Title 39 visit the American Library Association website at <https://www.ala.org/advocacy/privacy/statelaws>.

But even when not dealing with records governed by specific legislation, be sensitive to the concerns of privacy and the opposing right to know. Try to identify potentially confidential material during processing. Some items stand out, but others do not, and the processor must exercise a good deal of judgment.

Chapter 9: Publicity and News Releases

Preparing news releases about new acquisitions and recently processed collections is an important part of the archival enterprise. Once a **significant** collection has been acquired and accessioned, the archivist will want to write a general news release about the acquisition. The decision to write a release should be made on a collection-by-collection basis. Not all collections merit releases. The release should be relatively brief (no more than three pages double-spaced, or two pages single-spaced) and include the following information (see the examples of a news release at the end of the chapter):

A. Releases for New Acquisitions

Name of the collection

Information about the collection, including size, bulk dates, items or series of particular interest, and strengths of the collection. (be truthful; do not exaggerate)

Name of the donor (if agreed to on the Deed of Gift Form) and when it was donated.

Reason why the donor chose the Local History Department at the Columbus-Lowndes Public Library System; provide a quote from the donor if possible or a quote from the Archivist for the Local History Department or Director of the library.

Information on whether the collection is open or closed until it is processed; if the latter, give an estimate on when processing may be completed. (if possible)

Information on whom to contact about the collection; include complete name, telephone numbers, and email address.

Once the release has been written, double-check it for any grammatical and factual errors. If appropriate, have the donor review and revise the release **before** it is mailed to ensure that the information is correct.

After this is done, distribute the release to any current forms of media outlets and/or social media. Also, target other publications for releases, such as scholarly journals and organizational newsletters specializing in subjects covered by the collection.

Contact any appropriate television news outlets to be interviewed about the collection. This offers a great opportunity to visually showcase the collection.

Ask the donor for appropriate addresses too. Often the donor is your best source for specialized addresses. Make sure a copy of the news release is placed in the collection holding file for possible future reference. It is not to be included in the finding aid.

B. Releases for Newly Opened Collections

A news release should also be written when important collections are processed and open for research. As mentioned above, the decision to write a release should be made on an individual basis. The more significant and important a collection, the more likely a release should be written and distributed. The release should follow basically the same format and include much of the same information as outlined above. The release for a processed collection, however, may be slightly longer than one for a new acquisition because the collection is more familiar.

The archivist distributing the release should keep the considerations discussed above in mind when identifying and targeting media and scholarly channels for it. Also, consider mailing releases at a time when the collection relates to a particular holiday or celebration. For example, send releases about a labor collection near Labor Day; mail one about an African American collection during Black History Month, etc. Newspapers are always looking for a "hook" for stories about these observances. News about archives and historical materials makes a great "hook."

Example of a Press Release:

FOR IMMEDIATE RELEASE
August 27, 2008

Contact: Mona Vance-Ali
Columbus-Lowndes Public Library
662-329-5300
mvance@lowndes.lib.ms.us

The Billups-Garth Archives at the Columbus-Lowndes Public Library recently received a significant donation of glass plate negatives by Marion Stark Gaines, early female photographer from Mississippi.

COLUMBUS, Miss.- The Columbus-Lowndes Public Library is pleased to announce the recent addition of approximately 110 negatives, over ninety of which are glass plate negatives, by Marion Stark Gaines (1850-1942) to the Billups-Garth Archives. This addition greatly increases the historical value of Gaines' work as one of the earliest known published woman photographers of Mississippi.

Marion Stark Gaines was born in Columbus in 1850 to Peter and Sarah Stark and grew up in Mobile, Alabama. After marrying Captain Abner Strother Gaines in 1879, she moved to his family plantation and nursery "Peachwood" in State Line, Mississippi. Eventually, she had three children: George, Marion Viola, and Edmund.

It was while at Peachwood in the 1890s and early 1900s that Marion experimented with photography. Her work captured not only family life, but also social customs and race relations in the rural South.

Gaines published her photographs and wrote in popular contemporary magazines. In June of 1901, *Photo-Era* printed an article by Gaines titled "By the West Window" where she explored the difficulties and challenges of photographing flowers. Also, magazines such as *Ladies' Home Journal* and *Photo-Era* included images taken by Gaines.

Archivist Mona Vance said, "This is a significant addition to our collection on Marion Stark Gaines. Her work is invaluable and adds dialogue to the field of both photography and women's history."

A collection of over 200 Gaines' prints were previously donated to the Billups-Garth Archives by Marion's granddaughter Mrs. Chebie Bateman, former director of the Columbus-Lowndes Public Library.

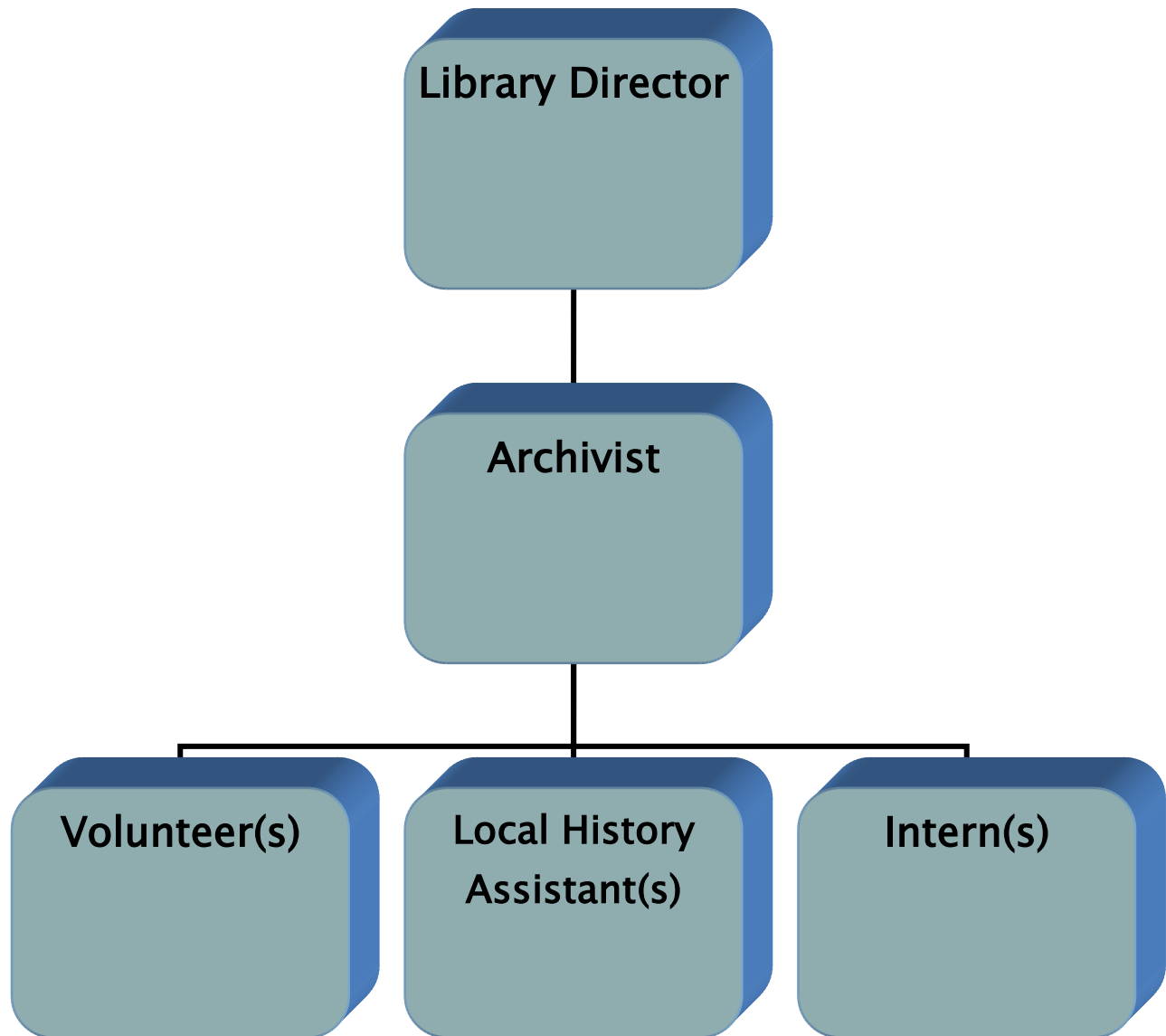
Mrs. Bateman and her daughter, Gaines Gaskin, viewed the collection for the first time several weeks ago and were amazed at their relative's skill. Bateman said, "I am so impressed and proud of my grandmother's work. I hope to see her photographs utilized by both scholars and enthusiasts alike."

The donation was made in memory of Mrs. Bateman's late husband Thomas Douglas Bateman, Jr.

The negatives were acquired from the Historic Mobile Preservation Society in Alabama.

For more information, contact Mona K. Vance at 662-329-5304 or at mvance@lowndes.lib.ms.us.

**APPENDIX A:
LOCAL HISTORY DEPARTMENT ORGANIZATIONAL CHART**



APPENDIX B:

GLOSSARY OF TERMS

ACCESSION. 1. The act and procedures involved in taking records or papers into physical and legal custody by an archival agency or manuscript repository. The purpose is to extend basic control over a collection as quickly as possible to prevent its being confused or mixed with other material in custody. 2. The materials involved in such a transfer of custody.

ACID. A substance capable of forming hydrogen ions when dissolved in water. Acids can weaken cellulose in paper, board, and cloth, leading to embrittlement. Acids may be introduced in the manufacture of library or archival material. Acids may also be introduced by migration from other materials or from atmospheric pollution.

ACID-FREE. Materials that have a pH of 7.0 or higher. Such materials may be produced from virtually any cellulose fiber source, if measures are taken during manufacture to eliminate the active acid from the pulp. However free of acid a paper or board may be immediately after manufacture, over time the presence of residual chlorine from bleaching, aluminum sulfate from sizing, or pollutants in the atmosphere may lead to the formation of acid unless the paper or board has been buffered with an alkaline substance.

ALKALINE BUFFER. Alkaline substances, which have a pH of over 7.0, may be added to materials to neutralize acids or as an alkaline reserve or buffer for the purpose of counteracting acids that may form in the future. A buffer may be added during manufacture or during the process of deacidification. A number of chemicals may be used as buffers, but the most common are magnesium carbonate and calcium carbonate.

APPRAISAL. The process of determining the value and thus the disposition of records based upon their current administrative, legal, and fiscal use; their evidential and informational or research value; their arrangement; and their relationship to other records.

ARCHIVES. The noncurrent records of an organization or institution preserved because of their continuing value; also referred to, in this sense, as archival materials or archival holdings. Or to use David B. Gracy's definition: Archives are the records, organically related, of an entity systematically maintained because they contain information of continuing value.

ARRANGEMENT. The process and results of organizing archives, records, and manuscripts in accordance with accepted archival principles, particularly provenance and original order, at as many as necessary of the following levels: repository; record group, collection, or comparable control unit; subgroup(s); series; file unit; and document. The process usually includes rehousing, labeling, and shelving of archives, records, and manuscripts and is intended to achieve physical or intellectual control and basic identification of the holdings. If there is no order, then the archivist imposes an order, which presents the records objectively and facilitates their use.

COLLECTION. 1. A body of manuscripts, papers, or records, including associated or printed or other materials having a common source. If formed by or around an individual or family, such materials are more properly termed personal papers. If the accumulation is that of a corporate entity, it is more properly termed records. 2. An artificial accumulation of manuscripts or documents devoted to a single theme, person, event, or type of record. 3. In a singular or plural form, the total holdings--accessions and deposits--of a repository.

CONSERVATION. The treatment of library or archival materials, works of art, or museum objects to stabilize them chemically or strengthen them physically, sustaining their survival as long as possible in their original form. Conservation implies the restoration of an item to a state close to the original by means of physical treatment. See also preservation.

CONTROL FILE. The file that contains all the paperwork on a particular collection. May include Deed(s) of Gift, copies of Accession Records, correspondence about the collection, copies of newspaper articles about the collection, etc.

CORRESPONDENCE. Letters, postcards, memoranda, notes, printed e-mail, and any other form of addressed, written communications sent and received.

CUBIC FOOT. An archival term used to describe the quantity of a collection. A bankers box, or records center carton, holds one cubic foot.

DEACCESSION. The process of removing material from the care and custody of an archives, either because the material has been reappraised and found to be unsuitable for the archives, or because the legal owner has requested its return, or because it has been agreed to transfer it to another repository. Deaccessioning is a serious matter which requires careful consideration and documentation because of legal ramifications and possible donor reaction. (See policy in appendices.)

DEED OF GIFT. An agreement transferring title to property without an exchange of monetary compensation.

DESCRIPTION. The process of establishing intellectual control over holdings through the preparation of finding aids.

DISPOSAL. Removal of an item, or items, in a collection following the appraisal process.

DONATION. A voluntary deposit of records involving the transfer of legal ownership, as well as custody, to the archives.

EAD. Encoded archival description. EAD is a nonproprietary encoding standard for machine-readable finding aids.

ENCAPSULATION; POLYESTER ENCAPSULATION. A protective enclosure for papers and other flat materials that involves placing the item between two sheets of transparent

polyester film that are then sealed around all the edges. The object is physically supported and protected from the atmosphere, although it may continue to deteriorate within the capsule. It can be removed easily from the capsule by cutting one or more of the edges of the polyester. Ideally an item should be deacidified before it is encapsulated.

FINDING AIDS. The descriptive media, published and unpublished, created by establishing physical, administrative, and intellectual control over records, papers, and collections.

GUIDE. A descriptive list of a repository's holdings.

LIGNIN. A component of the cell walls of plants that occurs naturally, along with cellulose. It is largely responsible for the strength and rigidity of plants, but its presence in paper and board is believed to contribute to chemical degradation. It can be, to a large extent, removed during manufacture. No standards exist for the term "lignin free," and additional research is needed to determine the precise role of lignin in the durability and permanence of paper.

LINEAR FEET. 1. A measurement for descriptive and control purposes of shelf space occupied by archives, records, or manuscripts. For vertical files (records filed on edge), the total length of drawers, shelves, or other equipment occupied is calculated; in the case of material filed horizontally (flat or piled up), the total vertical thickness is used. Linear feet, except for card indexes, may be equated with cubic feet on a one-to-one basis for descriptions of textual records. 2. A measurement for descriptive and control purposes of length of film, tape, or microfilm. (Usually expressed as feet.)

MANUSCRIPT. A handwritten, typed, or electronically reproduced document or communication.

MARC FORMATS. The Library of Congress developed the MARC formats in the late 1960s for communication of bibliographic information in machine-readable form. These MARC (for Machine-Readable cataloging) formats identify bibliographic data for computer recognition and manipulation. In the mid-1970s as variations were developed, the formats used by the Library of Congress became known as "LC-MARC formats." Since the early 1980s, however, LC-MARC formats have come to be referred to as "USMARC formats" because they are standards for MARC records in the United States.

NEUTRAL. Having a pH of 7; neither acid nor alkaline.

OCLC. (Online Computer Library Center), Inc. OCLC is a not-for-profit computer library service and research organization, which provides centralized and local turnkey systems to libraries. The OCLC Online Union Catalog is a database of bibliographic information. Each record in the Online Union Catalog contains location information. Records are included for the following types of materials: books, serials, audiovisual media, special instructional materials and kits, archives/manuscripts, maps, music scores, sound recordings, and machine-readable data files. Each institution participating in the OCLC Cataloging Subsystem may contribute to bibliographic records for items not already cataloged in the Online Union Catalog.

ORAL HISTORY DEED OF GIFT. A legal document transferring ownership of a taped interview from the interviewee to The University of Texas at Arlington Libraries, Special Collections Division. The deed of gift must be signed and dated by both the donor (interviewee) and the interviewer and by a university representative. Restrictions may be placed by the donor on the use of the interview.

ORIGINAL ORDER. The order in which records and archives were kept when in active use. The principle of original order requires that this order be preserved or reconstructed, unless it is clear that there was no order or that the records had been accumulated haphazardly.

PAPERS. 1. A natural accumulation of personal and family materials, as distinct from records. 2. A general term used to designate more than one type of manuscript material.

PERMANENT/DURABLE PAPER. A term generally applied to pH neutral papers.

PERSONAL PAPERS. The documents accumulated by an individual or a family.

POLYESTER. A common name for the plastic polyethylene terephthalate. Its characteristics include transparency, colorlessness, and high tensile strength. Polyester is useful in preservation because it is chemically stable. Commonly used in sheet or roll form to make folders, encapsulations, and book jackets. Its thickness is measured in mils. Common trade names are Mylar by DuPont and Melinex by ICI.

PRESERVATION. Activities associated with maintaining library, archival, or museum materials for use, either in their original physical form or in some other format. Preservation is considered a broader term than conservation. See also conservation.

PROCESSING. The operations performed on materials to make a collection available for use.

PROVENANCE. 1. The history of the ownership and custody of a particular manuscript or collection. 2. In general archival and manuscript usage, the "office of origin" of records, i.e., the entity that created or received and accumulated the records in the conduct of its business. Also the person, family, firm, or other source of personal papers and manuscript collections. 3. In archival theory, the principle that archives of a given records creator must not be intermingled with those of other records creators.

RECORDS. All recorded information, regardless of media or characteristics, made or received and maintained by an organization or institution in pursuance of its legal obligations or in the transaction of its business.

SERIES. File units or documents arranged in accordance with a filing system or maintained as a unit because they relate to a particular subject or function, result from the same activity, have a particular form, or because of some other relationship arising out of their creation, receipt, or use. Also known as a record series.

SORTING. The process by which manuscripts are physically divided into appropriate alphabetical, chronological, numerical, subject, or other groups. Less frequently used with archives, except when restoring them to their original or intended order.

SUBSERIES. An aggregate of file units within a record series readily separable in terms of physical class, type, form, subject, or filing arrangement.

UV FILTER. A material used to filter the ultraviolet (UV) rays out of visible light. Ultraviolet radiation is potentially damaging to library, archival, and museum objects. More UV is present in sunlight and fluorescent light than in incandescent light. Removing UV radiation from storage, use, and exhibition spaces will reduce the rate of deterioration of library materials stored there.

Add Appendix C here!!! Layout of library