

## **PACSCL/CLIR “Hidden Collections” Project**

### **SAA Conference**

Hi, I am Holly Mengel and today I am going to talk to you about the project on which I am working, about the lessons we learned, and about how you might be able to take our lessons learned and plan your own collaborative projects.

[Slide]: I work for the Philadelphia Area Consortium of Special Collections Libraries (or PACSCL) which was formed in 1985 by sixteen area repositories and today is comprised of 35 area repositories. While the consortium has always worked collaboratively on projects, in recent years, it has been working on projects that require collaboration for their success. The first of these was the PACSCL Survey Initiative, a project which laid the foundations for the project on which I am working. The Surveyors traveled around 22 area repositories and surveyed unprocessed collections, providing valuable information on collections’ content, condition, and research value. After that project was completed, PACSCL received a “Hidden Collections” grant from the Council on Library and Information Resources (CLIR) to process 114 of the collections which the surveyors assigned the highest research value. This is the project which I will be talking about in much greater detail in a minute.

One of the best results of this project, it that the participating repositories are really collaborating, not just within the confines of the project, but about everyday work-flow issues such as updating legacy finding aids, mastering the Archivists’ Toolkit, and working with interns.

[Slide]: The “Hidden Collections” project, which I am managing is, in my unquestionably biased opinion, the greatest project EVER in archives. We are working with some of Philadelphia’s most amazing collections at 23 different repositories. The goals were:

In order to achieve those goals, we are working with minimal processing as proposed by Greene and Meissner. Resources and time require that we process collections ranging from the 17<sup>th</sup> to the 21<sup>st</sup> centuries with the goal of 2 hours per linear foot (which is essentially impossible as a static rate). We are using the Archivists’ Toolkit to create standardized EAD finding aids and we are employing student processors to do the bulk of processing work. Finally, my colleague Courtney Smerz who is the project archivist, and I are blessed to be hosted by the University of Pennsylvania and their amazing Library staff. Delphine Khanna designed and engineered our shared finding aids site, and several catalogers are helping Courtney and me create authorized terms.

Currently (and VERY close to the end of processing), we have processed 1XX collections and entered 83 legacy finding aids into the Archivists’ Toolkit. The shared finding aid site is up and running and I consider it to be one of the project’s greatest successes.

[Slide]: There has been a lot of collaboration from start to finish with this grant, starting with the writing of the grant, moving forward into the establishment of standards and determining the methodology for the project, and continuing to today with discussions on implementing lessons learned into workflow. At the start of the project, establishing standards and methodology on which 23 repositories could agree

was the most critical task at hand. We created a processing manual and an archivists' toolkit manual as our first effort, both of which have evolved over the course of the project. We also, as the project progressed, created a best practices for data entry manual which has resulted in consistently better finding aids. The training is probably one of our biggest successes—a mandatory three day boot camp in which our student processors (and often, interested repository staff) learn first about our project expectations and methodology and the Archivists' Toolkit and then, work hands-on with collections, processing the papers, creating a finding aid in the Archivists' Toolkit, writing scope and content notes, and hopefully even writing a blog post. What we have found is that this training arms all our processors with the same basic skills and standards. Our student processors and repository staff have been continuing collaborators, offering critiques, suggestions and work-arounds in order to make our processing more successful and efficient. Finally, the project has worked extremely hard to be transparent in regards to our successes and failures—and we have shared that information with the archival community via our project website and especially the blog, to which Courtney and I, processors and repository staff contribute.

[slide] I realize that a lot of this talk makes it sound as if there have been no failures to report, but of course that is not true. We have had our fair share of challenges: some collections should not have been minimally processed and only a few should have been processed with the goal of 2 hours per linear foot. But beyond that, our main challenge has been technology.

We have installed the Archivists' Toolkit at almost all of the 23 repositories at which we have worked—but sometimes it has been a real burden to repository staff and, if they have it, their IT staff. Sometimes, repositories have not had desktop computers for our processors and we have used project laptops; sometimes only wireless internet was available and it was spotty enough that the AT did not always work. Fortunately, a member of our tech committee created a work-around—an excel spreadsheet with xml code embedded in the formula that could be easily imported into AT after the processing was completed. As a result, we have been able to work despite technology issues.

Work space for our processors has been another real problem—in many cases, there were work spaces that were perfect—in other cases, we worked in the reading room and the researchers using the resources came first. In those cases, we made do, as is obvious from this photograph.

Unequal resources has been an issue—and something that I was not really expecting—in some cases budgets did not allow for any new folders or boxes, etc. While mpls recommends not replacing folders if they are in acceptable condition and that is a standard that we have implemented, there have been times when we could not even replace damaged folders. Other repositories had amazing caches of supplies that would make many archivists weep with envy. And while I am talking about resources—the human kind was also an issue. We worked in repositories with one archivist to run the archives versus repositories with several archivists—surprisingly, that distinction did not always result in our processors getting more or less help.

And lastly, the issues with standards and methodology at 23 different places rears its ugly head. This is something that I think Courtney and I feel that we have learned most about—managing expectations.

One issue has been the reality of minimal processing. People say they are okay with it, but they often don't really know what it means and what the product will look like. As a result, because we were processing only a few collections which we wanted to fit into the remainder of their collections, we typically bent our standards to match theirs. But in the end, we know there were a few people who were disappointed with the appearance of the collections after processing.

[Slide] On the up side, however, we have had a lot of successes, some more expected than others. The PACSCL Finding Aids site, our shared EAD repository is available to the public, and while not all of the collections that we processed are there yet, there are more than 425 collections available to researchers from one website. This site is, in my opinion, good for both researchers and repositories.

The repositories benefit from having another (and sometimes the only) entry point to their collections on line. Further, it enables their collections to be found by topic and keyword searches, resulting in researchers locating collections in unexpected repositories. Likewise, we are hoping that researchers use the PACSCL Finding Aids site as their first step in finding primary sources. One of the great results of this site is that a single creator's papers which were often dispersed to multiple repositories throughout the area are now reunited intellectually.

[Slide] One of unexpected successes is team processing—we send our students to repositories in teams of two and without a question, the quality of processing and finding aid is better when our students work together rather than alone. They discuss the collection, catch their own mistakes, and most importantly, have someone with whom to share their excitement.

[Slide] Another unexpected success has been the centralized project staff and team, and training. In fact, I will be so bold as to say that this project could not have succeeded without it. Our students work for us, not for individual repositories and as a result, are able to remain focused on their project work rather than being pulled into various crises on site. Due to the centralized training, our processors know what we expect of them and follow the same workflow to accomplish our shared goals and use the same standards to create consistently good finding aids. Our processors have been one of the best parts of this project, which could not have been completed without them.

[slide] With all that said, I would like to share some lessons learned that I think will help collaborative projects to be successful.

[slide] First, know your region: how easy is it to get to your collaborating partners? Philly is ideal—I can walk to almost all of our repositories in about ½ an hour or less. On the other side of the coin, we have a few repositories that are about an hour away, and finding processors to work that far away from their homes was challenging. Who are your colleagues? Again, Philly is a great place to work collaboratively. In addition to PACSCL, there is also the Delaware Valley Archivists Group (DVAG) which meets regularly. Look for others in your area who share your challenges and your skills (or perhaps equally importantly) have different but complementary skills. Don't forget to think about resources—especially technology, space, supplies and staff availability.

[slide] Assign a collaboration enforcer. In this case, it is me (however, that is not me in the photograph—I never, to my knowledge, carried a sword as either a baby or an adult). Courtney and I are the only two people involved in the project to whom the project is a priority—all repository staff members have full time jobs and this project is piled on top of that—they are generally over-extended and their repositories are understaffed and underfunded. As a result, this project is asking a lot of them. But that is not unique—I would imagine that every collaborative project faces the same problems. As a result, it is absolutely necessary to assign someone to ensure that deadlines are met and that problems are resolved. As a result of my job, I think I may have become the biggest nag in the world.

[Slide] Develop a system of standards and training—even if it is just for your own repository. We borrowed liberally from a few on-line processing manuals to develop ours which is available on our website. The Archivists' Toolkit guide, also available on our websites, and our training documents, we just sort of made up. Our training documents are not yet available online, but I am happy to share them with anyone who is interested.

[Slide] Make your work an experiment. At the start of the project, I was scared to death that we were not going to get it done. As a result, I decided that the only way it was going to be okay NOT to finish was to make the project an experiment. And in the end, I am really glad it worked out this way—it makes our project even more collaborative. We ask our students and repository staff, throughout processing at each repository, to suggest improvements and to let us know what does and does not work. The project has evolved significantly due to their comments. Further, it has encouraged our transparency in reporting what has not worked—instead of failures, we have lessons learned.

[Slide] Make sure that you are ready to be flexible because a lot of times, things simply do not work out as planned. In fact, very few things have worked as Courtney and I expected in this project. For example, because 2 hours per linear foot is really not possible and our average rate of processing is closer to 3 hours per linear foot, we had to hire an extra team of processors for six months—if we had not been able to do that, this project simply could not have been accomplished. I have significantly more gray hair at this point, but we managed to figure out how to work around all the unexpected situations that arose.

[slide] Celebrate your milestones and successes—this might seem like fluff, but I think our parties have been incredibly helpful in maintaining morale and keeping our team working together. A lot of what we asked our brand new processors to do was really difficult and sometimes not fun, and we frequently did not meet our goal of 2 hours per linear foot. However, we celebrated everything there was to celebrate, with parties, group lunches and dinners, and ice cream. Many of our processors have formed really excellent friendships and work relationships with which to start their careers as archivists.

[slide] And finally, learn from others' mistakes and failures. We, as well as many other projects, have been very free with documenting our project—take advantage of information so that you don't reinvent the wheel or make mistakes that were already made! There are tons of great projects out there to learn from—several of which we have heard about today. Our project information is available on our website

and our finished finding aids are available on the PACSCL Finding Aids site. And in the spirit of collaboration, if you look at the sites, share your opinions! We are always happy for input!