

**PACSCL/CLIR Hidden Collections Processing Project, 2013-2015**  
**Survey and Processing Plan Worksheet**

**Collection Name / Number:** \_\_\_\_\_

**Research Value Rating:** \_\_\_\_\_ (see page 4)

<b>Date of survey</b>			
<b>Time started/ended</b>			
<b>Surveyor(s)</b>			
<b>Creator of Collection</b>			
<b>Title of Collection</b>			
<b>Collection Number</b>			
<b>Collection Dates</b>	Inclusive:		Bulk:
<b>Intellectual Access of Collection</b>  <i>Check all that apply. Provide explanation of each document as necessary. Be sure to note whether or not any of the information is publicly available.</i>	<input type="checkbox"/>	None	<input type="checkbox"/>
	<input type="checkbox"/>	Accession record	<input type="checkbox"/>
	<input type="checkbox"/>	Donor/Control file	<input type="checkbox"/>
	<input type="checkbox"/>	Printed card catalog card	<input type="checkbox"/>
	<input type="checkbox"/>	Other:	<input type="checkbox"/>
	Notes:		
<b>Donor Information/ Immediate Sources of Acquisition</b>  <i>How was the collection acquired and when? Record any special circumstances under which the records were obtained.</i>	<input type="checkbox"/>	Donor/Source	
	<input type="checkbox"/>	Date of Gift/ Acquisition	
	Notes:		
<b>Restrictions to Collection</b>  <i>Note any donor imposed restrictions AND repository imposed restrictions. Include explanation.</i>			
<b>Sensitive Material</b>  <i>Make note of sensitive material already identified by the donor, and anything identified during the survey. Look for: Social security numbers, student records, personnel records, patient records, etc.</i>			

Repository: \_\_\_\_\_

Collection name / Survey date: \_\_\_\_\_

<p><b>Extent</b></p> <p><i>How big is the collection? (1) Measure the linear footage; (2) Count the number of containers, volumes, rolled items, etc., that are NOT housed in containers. Explain any unusual circumstances in your calculation of the linear footage. For example, you may need to describe how you measured a large cache of rolled plans.</i></p>	<table border="1"> <tr> <td style="width: 20px;"></td> <td>Linear feet</td> </tr> <tr> <td></td> <td>Number of containers (include all containers, even oversized)</td> </tr> <tr> <td></td> <td>Number of volumes (unboxed)</td> </tr> <tr> <td></td> <td>Number of items (unboxed)</td> </tr> <tr> <td></td> <td>Oversized material (in flat files or otherwise unboxed)</td> </tr> </table> <p>Notes:</p>		Linear feet		Number of containers (include all containers, even oversized)		Number of volumes (unboxed)		Number of items (unboxed)		Oversized material (in flat files or otherwise unboxed)														
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<p><b>Location(s) of Collection</b></p>																									
<p><b>Separated Material</b></p> <p><i>Is the collection stored in one place within the repository? Or is it stored in multiple locations?</i></p>																									
<p><b>Related Collections</b></p> <p><i>Are there related collections located within the same repository? Or in other repositories?</i></p>																									
<p><b>Languages in Collection</b></p> <p><i>English, usually. But, were any other languages identified?</i></p>																									
<p><b>Special Formats</b></p> <p><i>Check all that apply. Add additional information about special formats as necessary. For example, record specific types of architectural drawings or film that are present.</i></p>	<table border="1"> <tr> <td style="width: 20px;"></td> <td>Architectural drawings</td> <td style="width: 20px;"></td> <td>General oversized</td> </tr> <tr> <td></td> <td>Art originals</td> <td></td> <td>Computer storage units</td> </tr> <tr> <td></td> <td>Artifacts</td> <td></td> <td>Film (negative, slide, motion picture, microfilm)</td> </tr> <tr> <td></td> <td>Audio/Visual material</td> <td></td> <td>Glass</td> </tr> <tr> <td></td> <td>Biological Specimens</td> <td></td> <td>Photographs</td> </tr> <tr> <td></td> <td>Botanical specimens</td> <td></td> <td>Other:</td> </tr> </table> <p>Notes:</p>		Architectural drawings		General oversized		Art originals		Computer storage units		Artifacts		Film (negative, slide, motion picture, microfilm)		Audio/Visual material		Glass		Biological Specimens		Photographs		Botanical specimens		Other:
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<p><b>Conservation/Preservation</b></p> <p><i>Check all that apply. Add additional information as necessary, including a description of any major issues, such as nitrate film or active mold. Note, whether the collection appears stable or if it requires immediate attention.</i></p>	<table border="1"> <tr> <td style="width: 20px;"></td> <td>Mold</td> <td style="width: 20px;"></td> <td>Tape</td> </tr> <tr> <td></td> <td>Recent pest damage</td> <td></td> <td>Thermofax paper</td> </tr> <tr> <td></td> <td>Deteriorating film base (nitrate or other)</td> <td></td> <td>Damaged binding(s)</td> </tr> <tr> <td></td> <td>Brittle paper</td> <td></td> <td>Newspapers</td> </tr> <tr> <td></td> <td>Metal fasteners</td> <td></td> <td>Water damage</td> </tr> <tr> <td></td> <td>Excessive dirt / dust</td> <td></td> <td>Other:</td> </tr> </table> <p>Notes:</p>		Mold		Tape		Recent pest damage		Thermofax paper		Deteriorating film base (nitrate or other)		Damaged binding(s)		Brittle paper		Newspapers		Metal fasteners		Water damage		Excessive dirt / dust		Other:
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<p><b>Biographical/Historical information</b></p> <p><i>About the creator of the collection.</i></p> <p><i>Research the history of the person or organization that created the collection, and write a brief, narrative description of their life. The note should be thorough, but it should focus on aspects of the person or organization that are best represented in the collection.</i></p> <p><i>This note should be written in full sentences and ready to be made public.</i></p>	<p><i>Time spent research and writing bio/hist. note:</i></p>
<p><b>Contents of collection (Scope and Contents note)</b></p> <p><i>About the contents of the collection.</i></p> <p><i>Write a brief, narrative description of the contents of the collection as a whole. Include a list of the types of documents (i.e. correspondence, diaries, financial records, etc.) and general subjects covered. Note too, any topics that you expected to find but did not and, conversely, anything you found that was not expected.</i></p> <p><i>This should be written in full sentences and ready to be made public.</i></p>	<p><i>Time spent writing scope note:</i></p>
<p><b>Access points</b></p> <p><i>Name and subject authorities.</i></p> <p><i>The PACSCL/CLIR Project recommends using authorized headings from the Library of Congress and the Art and Architecture Thesaurus. Identify a total of 5 to 10 names, subjects and genres, depending on the size of the collection.</i></p>	<p><i>Time spent researching authorities:</i></p>

Repository: \_\_\_\_\_

Collection name / Survey date: \_\_\_\_\_

<p><b>Ratings</b></p> <p><i>Rate the condition of the collection from 1 to 5 in each category, except Research Value Rating. Provide narrative description/explanation for ratings as necessary. Team consensus is required.</i></p> <p><i>Refer to the PACSCL Survey "Ratings" document for explanation of the categories and guidance in assigning values.</i></p> <p><i>Refer to this document often, as it will help guide you in assigning ratings across collections in the most objective way possible.</i></p> <p><b>Research Value Rating</b>  <i>Rate interest and documentation quality separately, from 1 to 5. Add the numbers together to get your total RVR, which is on a scale of 2 to 10.</i></p> <p><i>Refer to the PACSCL Survey "Ratings" document for guidance in assigning values.</i></p> <p><i>Record the RVR on the upper left corner of page 1 of this worksheet, so that it is easily accessible. This will help with prioritizing collections for processing.</i></p>	<table border="1"> <thead> <tr> <th>Rating</th> <th>Rating category/Notes</th> </tr> </thead> <tbody> <tr> <td></td> <td><b>Condition of Material</b></td> </tr> <tr> <td></td> <td><b>Quality of Housing</b></td> </tr> <tr> <td></td> <td><b>Physical Access</b></td> </tr> <tr> <td></td> <td><b>Intellectual Access</b></td> </tr> <tr> <td></td> <td><b>Research Value Rating (RVR)</b></td> </tr> </tbody> </table>	Rating	Rating category/Notes		<b>Condition of Material</b>		<b>Quality of Housing</b>		<b>Physical Access</b>		<b>Intellectual Access</b>		<b>Research Value Rating (RVR)</b>
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<p><b>Level of Processing Desired</b></p> <p><i>What does this collection need to make it accessible to researchers? Will a good collection level record be enough? Or is more detailed arrangement and description required?</i></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;"></td><td>Collection level</td></tr> <tr><td></td><td>Series level</td></tr> <tr><td></td><td>Folder level</td></tr> <tr><td></td><td>Item level</td></tr> </table> <p>Notes:</p>		Collection level		Series level		Folder level		Item level																								
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<p><b>Type of Processing</b></p> <p><i>Should this collection be traditionally or minimally processed, to provide the best accessibility to researchers? How much in terms of time and resources should be invested in this collection? Will there be one processor or multiple individuals working on this collection? (This will affect the weeks of work it will take to complete the collection!)</i></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;"></td><td>No processing is necessary at this time</td></tr> <tr><td></td><td>Traditional processing (8+ hours per linear foot)</td></tr> <tr><td></td><td>Minimal processing (4 hours per linear foot)</td></tr> <tr><td></td><td>Mixed processing (combine a minimal and traditional approach)</td></tr> <tr><td></td><td>Estimated time needed (X hours per linear foot multiplied by total number of feet in collection)</td></tr> <tr><td></td><td>Weeks of ____ processors working together/alone</td></tr> <tr><td></td><td>Begin date</td></tr> <tr><td></td><td>Anticipated end date</td></tr> </table> <p>Notes:</p>		No processing is necessary at this time		Traditional processing (8+ hours per linear foot)		Minimal processing (4 hours per linear foot)		Mixed processing (combine a minimal and traditional approach)		Estimated time needed (X hours per linear foot multiplied by total number of feet in collection)		Weeks of ____ processors working together/alone		Begin date		Anticipated end date																
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<p><b>Proposed Breakdown of Activities</b></p> <p><i>Provide general guidance regarding how much time should be spent on each processing activity. Generally, description and arrangement will take the largest portion of allotted time, but this will vary from collection to collection. These activities can be modified, but each activity should correspond exactly with the activity breakdown on the corresponding processing worksheet's daily log.</i></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;"></td><td>Orientation</td></tr> <tr><td></td><td>Description: Box-level (survey)</td></tr> <tr><td></td><td>Description: Folder-level (folder titles)</td></tr> <tr><td></td><td>Physical arrangement</td></tr> <tr><td></td><td>(Re)Housing</td></tr> <tr><td></td><td>Data entry</td></tr> <tr><td></td><td>Biographical/Historical note</td></tr> <tr><td></td><td>Scope note</td></tr> <tr><td></td><td>Authorities and access terms</td></tr> <tr><td></td><td>Edits/revisions</td></tr> <tr><td></td><td>Blog/outreach activities</td></tr> <tr><td></td><td>Worksheets</td></tr> <tr><td></td><td>Photos (taking, uploading)</td></tr> <tr><td></td><td>Meetings</td></tr> <tr><td></td><td>Final review with supervisor</td></tr> <tr><td></td><td>Other (please specify!)</td></tr> </table> <p>Notes:</p>		Orientation		Description: Box-level (survey)		Description: Folder-level (folder titles)		Physical arrangement		(Re)Housing		Data entry		Biographical/Historical note		Scope note		Authorities and access terms		Edits/revisions		Blog/outreach activities		Worksheets		Photos (taking, uploading)		Meetings		Final review with supervisor		Other (please specify!)
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<p><b>Supply needs</b></p> <p><i>The type of processing selected (traditional or minimal) will determine supply needs.</i></p> <p><i>Provide an explanation for supply needs, as necessary. For example, note whether requested supplies are meant to rehouse the entire collection or just part of it and why. Which part(s) of the collection will benefit from new housing the most?</i></p>	<p>Boxes:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;"></td><td>Record cartons</td></tr> <tr><td></td><td>Document boxes (legal)</td></tr> <tr><td></td><td>Document boxes (letter)</td></tr> <tr><td></td><td>Oversized (note dimensions):</td></tr> <tr><td></td><td>Custom (note dimensions):</td></tr> <tr><td></td><td>Other:</td></tr> </table> <p>Folders:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;"></td><td>Legal</td></tr> <tr><td></td><td>Letter</td></tr> <tr><td></td><td>Other:</td></tr> </table> <p>Other supplies:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20%;"></td><td>Mylar sleeves</td></tr> <tr><td></td><td>Book tape</td></tr> <tr><td></td><td>Other:</td></tr> </table> <p>Notes:</p>		Record cartons		Document boxes (legal)		Document boxes (letter)		Oversized (note dimensions):		Custom (note dimensions):		Other:		Legal		Letter		Other:		Mylar sleeves		Book tape		Other:
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<p><b>Proposed Arrangement and List of Series</b></p> <p><i>How would the surveyors arrange this collection, if they were to process it?</i></p> <p><i>Provide explanation for suggested series and subseries, as necessary.</i></p>																									
<p><b>Notes to Processors</b></p> <p><i>Include a brief description of anything future processors ought to know about the collection.</i></p> <p><i>Highlight things about the collection that make it difficult to use or understand in its current state. You can speak to how easy or difficult you think it will be to process and why.</i></p> <p><i>Also include why the collection is valuable, historically speaking, and describe how well it does or does not document the primary subject matter.</i></p>																									