

**PACSL/CLIR Hidden Collections Processing Project, 2013-2014**

**Processing Packet Worksheets - All**

**Processing Worksheet**

At the end of every day, complete the processing log on the back of this worksheet. Add extra sheets as necessary. When you finish processing the collection, be sure to fill out all fields included below, including a total tally of processing times, using data collected on the back of this worksheet.

<b>Repository:</b>			
<b>Collection:</b>			
<b>Processor(s):</b>			
<b>Date started:</b>		<b>Date completed:</b>	
<b>Extent pre-processing:</b>		<b>Extent post-processing:</b>	
<b>Did a usable order exist?</b>	YES / NO		
<b>Existing descriptive docs.:</b>			

**Processing times**

*Tally the hours invested in each activity for the duration of processing, from the log on the back of this worksheet. Be sure to account for all team members. For example, if 2 processors completed data entry for 7 hours on one day, the total time for data entry that day is 14 hours. To calculate the GRAND TOTAL, simply add the total hours for each category. To calculate the Average hour per linear foot, divide the GRAND TOTAL by the "Extent pre-processing," listed above.*

	<b>Physical processing: Folder titles</b>
	<b>Physical processing: Arrangement and housing</b>
	<b>Data entry</b>
	<b>Writing notes</b>
	<b>Revisions</b>
	<b>Blog</b>
	<b>Worksheets</b>
	<b>Flickr / photographs upload</b>
	<b>Final collection review with supervisor</b>
	<b>Other activities (please specify!)</b>
	<b>GRAND TOTAL ( _____ Hours originally allocated for processing, from processing plan)</b>
	<b>Average hour per linear foot</b>

**Minimal processing notes**

*Was the collection a good candidate for minimal processing? Why? In particular, comment on how realistic the time frame was and whether the physical work completed was adequate.*

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**Is this collection finished?**

*We invested the bare minimum in terms of time and resources in this collection. If you had additional time/supplies, what would you do? For example, would this collection benefit from appraisal, additional weeding, more refined arrangement? Why?*

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**The Archivists' Toolkit notes**

*Were there problems with AT that prevented you from completing data entry? How many hours/days were you held up?*

**The Herbison Spreadsheet notes**

*If AT was not available/useable, did you find the spreadsheet a good substitute?*

**Other activities notes**

*Was there any necessary activity that took a considerable amount of time processing that did not fit into the pre-determined processing metrics categories? Please describe.*





### Processing Checklist

Before completing processing, review this list, checking each item as you determine it has been completed. Write "n/a" in fields that do not apply. Outstanding action items must be approved by supervisor in advance!

<b>Date worksheet completed:</b>	
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<b>PROCESSING</b>	
	All records and items in the collection have been accounted for, included, and verified by supervisor and staff.
	Folder labels are complete; folders are labeled with at least collection name/number, folder title and box and folder numbers consistently recorded on the tabs.
	Boxes are numbered and labeled, with new labels.
	Volumes are numbered and identified, with new labels/book marks.
	Boxes and volumes have been returned to the shelf, in numeric order.

<b>FINDING AID</b>	
At the collection level record	
	DACS compliant collection title.
	Collection dates have been adjusted, and recorded in the dates field in AT.
	Linear footage has been recalculated, containers/volumes counted, and all recorded in the extent field of AT.
	Each series/subseries title starts with "Series I." or "Subseries Ia.", etc.
Click on the "Notes etc. & Deaccessions" tab	
	Scope and contents note.
	Biographical/historical note.
	Abstract.
	Language of the materials note (if necessary).
	Conditions governing access.
	Conditions governing use.
	Immediate source of acquisition (if known).
	Separated materials note (if necessary).
	Related archival materials (if necessary).
	Processing information note.
Click on the "Names and Subjects" tab	
	Review existing authorities. I compiled an add/remove list for my supervisor.
Click on the "Finding Aid Data" tab	
	DACS compliant title.
	Enter your name as author.
	Select DACS as the description rules.
	Assign a language of the finding aid. (ie: "English.")
	Sponsor note.
	Transcribe the series names.
	Change the finding aid status to "under-revision".

<b>WORKSHEETS</b>	
	Processing worksheet.
	Digitization worksheet.
	Preservation worksheet.
	Research Value Rating worksheet.

<b>EDITING AND REVIEW</b>	
	Review teammate's work and provide feedback.
	Copy HTML report into MS Word, to review finding aid for spelling and grammar issues.
	Correct all spelling/grammar issues <b>in AT</b> .
	Re-export HTML <u>AND</u> EAD, and send to supervisor.
	Schedule appointment with supervisor for <u>date/time</u> to review worksheets, the finding aid and collection.

**Exhibits/Digitization Worksheet**

An archival collection houses documents that may have significant informational value or visual appeal, warranting future digital reproduction, use in an exhibition, or both. In the space below, list the materials in this collection that may be good candidates for digitization and/or exhibition. In the comments section, reflect on why. Use additional worksheets as necessary.

<b>Date worksheet completed:</b>	
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<b>A record's value may be based on its informational content, visual appeal or both. Note the record(s), its location within the collection and its value.</b>			
<b>Box</b>	<b>Folder</b>	<b>Item or groups of items</b>	<b>Digitization, exhibition or both</b>

<b>Comments</b>

**Preservation Worksheet**

Because little time is available for preservation work in minimal processing, processors should keep track of preservation issues as they are identified during processing, so that repositories are aware of issues that must be addressed.

<b>Date worksheet completed:</b>	
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**Preservation issues**

*Check all that apply. As you process, keep track of the general preservation issues / special formats you identify. Place markers in files and/or boxes in which you identify items in need of further attention. After the collection is processed, provide location information, as necessary.*

	Acidic housing	See box(es):	Entire collection? Y / N
	Artifacts	See box(es):	Entire collection? Y / N
	Audio-Visual materials	See box(es):	Entire collection? Y / N
	Architectural drawings	See box(es):	Entire collection? Y / N
	Brittle paper	See box(es):	Entire collection? Y / N
	Computer storage devices	See box(es):	Entire collection? Y / N
	Damaged manuscripts	See box(es):	Entire collection? Y / N
	Damaged bindings/volumes	See box(es):	Entire collection? Y / N
	Excessive dirt/dust	See box(es):	Entire collection? Y / N
	Excessive duplication	See box(es):	Entire collection? Y / N
	Film (negatives, slides, motion picture, etc.)	See box(es):	Entire collection? Y / N
	Film (nitrate)	See box(es):	Entire collection? Y / N
	Live bugs or other pests	See box(es):	Entire collection? Y / N
	Metal fasteners	See box(es):	Entire collection? Y / N
	Mold	See box(es):	Entire collection? Y / N
	Newspaper	See box(es):	Entire collection? Y / N
	Photographs	See box(es):	Entire collection? Y / N
	Tape	See box(es):	Entire collection? Y / N
	Thermofax paper	See box(es):	Entire collection? Y / N
	Water damage	See box(es):	Entire collection? Y / N
	Other:	See box(es):	Entire collection? Y / N
	Other:	See box(es):	Entire collection? Y / N

**Comments**

*What actions need to be taken next? Do any of the above listed issues require immediate attention? Or, are items more or less stable?*

*Have you notified repository staff of these issues? Y/N*

### Post Processing Research Value Rating Evaluation

Prior to writing the finding aid, processors should complete a post processing Research Value Rating (RVR) evaluation. The process of reassessing the collection’s RVR will aid in collection description, and validate the survey’s rating.

<b>Date worksheet completed:</b>	
<b>Post processing RVR:</b>	

A collection is considered valuable to researchers to the extent that it includes relatively rare, extensive or detailed information on topics that have received considerable prior attention, are gaining currency, or have apparent potential to attract significant researcher interest. A topic may be of very high, moderate, slight or negligible interest. The intrinsic interest of the collection itself may also count as a topic. Depending on the rarity, extensiveness, and detail of a body of material, the documentation on a topic may be very rich, rich, moderately rich, incidentally valuable, or slight.

The Research Value Rating is determined by adding the ratings of the topics best or most substantially represented (**interest ranking**) in each collection to the ratings of the **quality of documentation** on those topics in the collection.

<b>Determine Interest and Quality of Documentation Rankings</b>			
<i>Processors should talk to repository staff to determine how frequently over the past five years researchers sought materials on topics documented in the collection. Using knowledge acquired through processing the collection, processors should consider: how rare the information available on a particular topic(s) in the collection is (there could be multiple topics in the collection, even topics that the collection was not necessarily created or retained to document); how extensive the information in the collection is; how deep or detailed it is; and whether anything is missing (span of years, papers or documentation of key players, etc.).</i>			
<b>Assign Interest Ranking Value</b> <i>Circle or <b>BOLD</b> one.</i>	Very High: 5	<b>Assign Quality of Documentation Value</b> <i>Circle or <b>BOLD</b> one.</i>	Very Rich: 5
	High: 4		Rich: 4
	Moderate: 3		Moderately Rich: 3
	Slight: 2		Incidentally valuable: 2
	Negligible: 1		Slight: 1

<b>Research Value Rating (RVR)</b>
<i>Add the values assigned for the Interest and Quality of Documentation rankings to determine the post processing RVR. RVR can range from a high of 10 to a low of 2. Transcribe the RVR into the space above.</i>

<b>Comments</b>
<i>Briefly described the factors that led to your decisions. Compare your RVR to the pre-processing RVR. What do you think accounts for this difference (if there is any)?</i>



### Scope and Contents Note Worksheet

Use the following guide to get started writing the collection level scope and contents note, on the back of this worksheet. *This can and should be changed or expanded upon as the collection demands.*

- **First**, processors should describe the contents of the collection broadly. Include a list of the types of materials present, the main subjects covered in the collection, as well as the collection’s date range. If one topic/subject represents the bulk of the collection, that should be noted too.

*For example:*

*The name of the collection, houses the business or institutional or organizational or records or personal or family papers of name of organization or person or family. This collection, which dates from year to year, consists of list types of records, evidencing describe what they evidence or document. Add a general statement about the whole of the collection and what it documents in history.*

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- **Second**, immediately following the broad description of the entire collection processors should list the number of series and their titles. The PACSCL Project always uses quotes around the name of the series within the context of the scope and content note:

*For example:*

*The collection is arranged into however many series: “Series I, date” and “Series II, date.”*

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- **Third**, describe each series briefly, mentioning date ranges, series highlights, gaps in the records, series arrangement and any unique perspectives on topics documented within the series.

*For example:*

*The “Correspondence” series includes letters to and from John Smith, the bulk of which are from Smith’s customers regarding tailoring work. In addition there are letters from his parents in England, as well as a few letters from extended family telling Smith of the death of his parents in late 1835. A letter of particular interest may be the form letter sent by Smith to all his customers in 1845, informing them of his plan to close his shop, due to the onset of blindness. This series is arranged chronologically.*

*Hint: Series should always be described in the order in which they are intellectually arranged.*

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➤ **Fourth**, describe how the collection fits within the more general context of history and how this collection will be useful to researchers. As the processor of the collection, you will be the authority of the contents of the collection and will be the most able to speak to the usefulness of the collection.

*For example:*  
*This collection is unique in that it evidences a worker’s interactions with trade societies and customers in early 19<sup>th</sup> century Philadelphia. Textiles were one of Philadelphia’s largest trades and advances made by this area’s workforce affected national practices. While collections created by business owners are common in Philadelphia repositories, this collection provides a new insight into the industry. Researchers interested in the textile industry in Philadelphia, tailors in Philadelphia, and trade societies will find this collection to be a valuable resource.*

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➤ **Fifth**, in the Archivists’ Toolkit, combine the four components of the scope and contents note from above to form one complete scope and contents note. You may need to tweak your text, in order to make the four components fit together neatly.

### Archivists' Toolkit Administrative Information

#### Sponsor Note:

The creation of the electronic guide for this collection was made possible through generous funding from The Andrew W. Mellon Foundation, administered through the Council on Library and Information Resources' "Cataloging Hidden Special Collections and Archives" Project.

#### Processing Information Note:

The processing of this collection was made possible through generous funding from The Andrew W. Mellon Foundation, administered through the Council on Library and Information Resources' "Cataloging Hidden Special Collections and Archives" Project.

This collection was minimally processed in 2013-2014, as part of an experimental project conducted under the auspices of the Philadelphia Area Consortium of Special Collections Libraries to help eliminate processing backlog in Philadelphia repositories. A minimally processed collection is one processed at a less intensive rate than traditionally thought necessary to make a collection ready for use by researchers. When citing sources from this collection, researchers are advised to defer to folder titles provided in the finding aid rather than those provided on the physical folder.

Employing processing strategies outlined in Mark Greene's and Dennis Meissner's 2005 article "More Product, Less Process: Revamping Traditional Processing Approaches to Deal With Late 20th-Century Collections," the project team tested the limits of minimal processing on collections of all types and ages in 16 Philadelphia area repositories. A primary goal of the project, the team processed at an average rate of 4 hours per linear foot of records, a fraction of the time ordinarily reserved for the arrangement and description of collections. Among other time saving strategies, the project team did not extensively review the content of the collections or complete any preservation work.

#### Conditions Governing Access (for an unrestricted collection):

~~This collection is open for research use.~~  
[Series/box/folder] is restricted until [date]. Please contact the Archives for additional information.

~~Conditions Governing Use:~~ apply. Please contact the Archives with requests for copying and for authorization to publish, quote or reproduce the material.

#### Preferred Citation. *(Change highlighted portion for each collections' finding aid!!)*

[Description and date of item], [Box/folder number], [Collection title, dates], [Repository].