

PACSCL/CLIR Hidden Collections Processing Project, 2009-2012
Guide for Repository Staff
Preparing for a Surveying and/or Minimal Processing Project

Although surveying and processing plan creation and minimal processing are generally undertaken by project staff, repository staff must be involved during the planning phase to ensure the best result possible given time and manpower constraints.

Before surveying and/or the creation of the processing plan takes place, repository staff must:

1. Gather known information about collections
 - a. Include accession files, vertical files, existing inventories, etc.
 - b. Talk to colleagues to find out if there is undocumented institutional memory or other resources available regarding the collection or its custodial history
2. Gather relevant background/reference materials that may be useful to the surveying or processing team, such as institutional histories, biographies or autobiographies of prominent individuals represented in the collections, journal articles, etc.
3. Identify the storage locations for all the collections to be surveyed or processed and, ideally, co-locate all components of collections
 - a. Look for components of collections stored in multiple locations, for example, in special climate controlled rooms and/or with oversized material
 - b. Talk to colleagues to find out if there is additional material beyond what is immediately known
4. Identify potential issues with collections
 - a. Inform surveyors or processors of sensitive topics; personal information such as social security numbers or medical information; case files; or fragile material (as a few examples)

Before processing takes place

1. Meet with the processing team and/or their supervisor to discuss the processing plans developed for each collection
 - a. State the results expected from the processing project (collection level, series level, folder level, or item level arrangement and description)
 - b. Based upon the findings of survey and processing plan, determine how to deal with identified issues within collections and where restrictions, if necessary, should be instituted
 - c. Determine what processors should do with large caches of duplicates, if present in the collection
 - d. Review and edit preliminary biographical/historical note and name and subject authorities.

2. Talk to colleagues, particularly reference staff, regarding the implications of minimal processing. Ideally, the entire collections staff will understand and accept MPLP and support the processing project.
3. Prioritize collections for processing
 - a. Look at the survey's research value ratings to determine what collections are worthy of being placed at the top of a priority list
 - b. Determine what collections can be processed to the desired level within the time frame of the project and with available staff
 - c. Establish an order in which collections should be processed (collections deemed not suitable for minimal processing should be placed at the end or removed from the list)
4. Purchase or gather all necessary supplies
 - a. Based upon the recommendations in the survey/processing plan, determine if your repository can afford to purchase supplies suggested for processing.
 - b. All supplies should be available on the first day of processing
5. Provide an example of how collection boxes and folders should be labeled
 - a. Processing teams are required to provide complete box and folder labels to guarantee that material can be retrieved for and returned following reference
 - b. Folder labeling may need to be amended with abbreviations, etc. to accommodate minimal processing time constraints. For example, instead of the "Logan family papers, #1712," processors may write only "Logan, #1712."
6. Plan to close collections to researchers during the processing
 - a. Inform reference staff that the collection will not be accessible to researchers during the processing of the collection. If exceptions are made, processors must be made aware of usage.
 - b. If closing the collection is a significant problem, the collection probably should not be minimally processed.