L. Tom Perry Special Collections Processing Plan Review Policy

30 January 2008

1. The L. Tom Perry Special Collections is committed to meeting national and local standards in the processing of manuscript collections. This involves compliance with the 90-day policy, minimal processing standards as set by the department, the CCLA EAD Best Practices Guide and the local implementation of *Describing Archives: A Content Standard*. In order to ensure that these standards are met processing plans will be completed for all collections and reviewed under the following circumstances:

a. **Curators**
   
   i. Processing plans for collections over 25 linear feet will be:
      
      1. Reviewed and discussed with immediate supervisor
      
      2. Presented to the Board of Curators for consultation and discussion
      
      3. Reviewed and approved by the curator’s immediate supervisor.

   ii. Processing plans for high profile collections will be:
      
      1. Reviewed and discussed with immediate supervisor
      
      2. Presented to the Board of Curators for consultation and discussion
      
      3. Reviewed and approved by the curator’s immediate supervisor.

b. **Students/Interns/Volunteers/Paraprofessionals**
   
   i. All processing plans will be reviewed and approved by their immediate supervisor.
Processing Procedures Manuals
I. INTRODUCTION

II. BASIC ARCHIVAL PRINCIPLES
   A. ARCHIVAL MATERIALS AND COLLECTIONS
   B. PROVENANCE
   C. ORIGINAL ORDER
   D. LEVELS OF CONTROL
      1. Arrangement
      2. Description

III. WORKFLOW

IV. PLANNING
   A. BACKGROUND RESEARCH
   B. SURVEYING THE COLLECTION
   C. PROCESSING PLANS
   D. HOW MUCH WORK TO PERFORM?
   E. HOW LONG SHOULD PROCESSING TAKE?

V. ARRANGEMENT
   A. ORGANIZATION
      1. Record group level
      2. Collection level
      3. Accession level
      4. Series level
         a. General considerations
         b. Series based on a common characteristic
         c. Series based on a common organizing principle
         d. Series emerging from a common function or activity
         e. Series emerging from a common source or origin
         f. Sequence of series
         g. No series
      5. Below the series level
         a. General considerations
         b. Subseries
         c. Filing unit
         d. Items
   B. HOUSING & HANDLING
VI. DESCRIPTION

A. TITLES

1. Basic rules
a. Specificity
b. Inheritance and clarification
c. Style issues

2. Name segments in titles
a. Predominant responsibility
b. Form of the person, corporate, and family names
c. Corporate body name changes
d. Unknown creators or repository-created collections

3. Form segments in titles
a. Three or more forms?
b. One or two forms?
c. One or two predominate forms?
d. Common forms based on material type
e. Common forms based on function or purpose

4. Topical segments in titles

B. DATES

C. ORGANIZING AND LABELING FOLDERS

1. Logistics of labeling
2. Answers to FAQs about filing

D. MEDIA MATERIALS

1. Describing photographs
2. Moving images
3. Sound recordings

E. DATA ELEMENTS IN THE FINDING AID

1. Using levels of description effectively
2. Descriptive Summary

   a. Title
   b. Inclusive dates
   c. Collection number
d. Creator
e. Extent (and measuring the collection)
f. Physical location
g. Abstract

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7. COMMON RESTRICTED RECORDS ....................................................................................78
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B. STYLE ISSUES .............................................................................................................77

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