

# Resources for **Volunteer Programs in Archives**



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# Introduction

When we celebrated the bicentennial of the United States in 1976, staff at the National Archives in Washington, D.C. recruited and trained volunteers to provide visitors of the Declaration of Independence, Constitution, and Bill of Rights in our Rotunda with a richer experience. The very next year, when *Roots* by Alex Haley generated tremendous interest in our resources for genealogists, we recruited and trained additional volunteers to help us serve our research public.

From these beginnings and for the past three decades, the National Archives has proudly supported volunteer programs in D.C., as well as in our regional facilities

and presidential libraries—and, more recently, online. Hundreds of volunteers across the agency are engaged in a variety of activities, contributing hundreds of hours and their many talents to dozens of projects, and we appreciate them every day! We know that this appreciation is not unique to the National Archives—we share this sentiment with many other archival institutions that support and benefit from volunteers.

We also realize that volunteers do not just magically appear, volunteer projects do not manage themselves, and volunteers do not (usually) train themselves! Staff members play invaluable roles; they serve as project managers, human capital

specialists, teachers, and more. They also create tools to assist in the volunteers' efforts.

These resources, from multiple archival facilities—both large and small—were assembled to serve the larger archival community and to assist archives' professionals who work with volunteers or who are considering doing so. The National Archives was proud to take the lead in this effort with the Society of American Archivists, and we are delighted that colleagues from nearly a dozen other institutions generously contributed resources.

—DAVID S. FERRIERO  
*Archivist of the United States*

## How to Use This Resource

Box after box of material needing rehousing, collections waiting for finding aids, hours of untranscribed oral histories languishing . . . the list of archival projects we would like to complete often seems endless. Across the United States, many archival institutions are expanding their capacity to accomplish these and other projects by using volunteers.

This guide introduces you to some of the volunteer activities underway in various archives. Arranged by institution, the guide offers descriptions of sample

projects. The smallest project uses one volunteer, the largest several dozen. The project descriptions outline all kinds of work, from transcription to processing, from reference to indexing. Each description is meant to offer an example of one way to organize work. If you have never used volunteer help in your organization, this guide will provide you with a sense of the possibilities. And if you are interested in expanding or rethinking your volunteer program, this guide will offer some ideas. Before you read the project descriptions, you may

find it useful to review the next section, which contains a general overview of working with volunteers in archival institutions.

After the descriptions of sample projects, you will find other resources, including volunteer applications, handbooks, emergency contact forms, and volunteer job descriptions. These model forms and training materials may inspire you to revise your existing forms, or they may help you develop a brand new volunteer program.



A young Charles Thayer dressed in a Cossack costume his father purchased in Russia, ca. 1914. The photo is part of the Papers of Charles Thayer collection, which contains more than 1,300 photos that two volunteers worked to describe over the course of three years. *Courtesy of the Harry S. Truman Presidential Library and Museum.*



General Frank E. Lowe with a captured Russian anti-tank gun in South Korea, September 6, 1950. This is from the Harry S. Truman Papers, President's Secretary's Files, Frank E. Lowe File—another collection described by a volunteer at the Harry S. Truman Presidential Library and Museum. *Courtesy of the Harry S. Truman Presidential Library and Museum.*



Bess Truman in March, 1946, writing a note at a desk. This photo is from the collection of Truman Papers, Family, Business and Personal Affairs, which was described by a volunteer. *Courtesy of the Harry S. Truman Presidential Library and Museum.*



# Volunteers in Archives: An Overview

## Why have volunteers in archives?

It is in the nature of archives to have backlogs—sometimes huge backlogs. And it is an unfortunate reality that archives are often understaffed. At a time when the volume of archival records created is increasing monumentally, it is common in the U.S. and elsewhere in the world for budgets to be cut and paid staff to be reduced.

## What attracts volunteers to archives?

Volunteering at archives appeals to people who want to contribute to something larger than themselves, something that will be here long after they and their progeny are gone. A love of history also attracts volunteers to archives. For students and those seeking new careers, the training they receive and the hands-on experience with original records in archives are invaluable.

## How do volunteers serve at archives?

Volunteers are an infusion of energy. Their enthusiasm for preserving and providing access to the records, as well as their drive to work on archival projects, can be contagious. This can-do attitude impacts not only the staff who work with volunteers but also other staff at the archives.

Volunteers can often tackle the valuable projects that staff do not have the time to complete. Preparing finding aids that assist reference and pull staff as well as researchers, for example, contributes to the organization as a whole. Conducting holdings maintenance, which can consume time and energy, has a similar positive effect on the organization and its customers.

Volunteers also serve as advocates for archives. They get the word out about the important role of a repository, public programs, and records of genealogical value; explain how to research records at the archives or online; discuss their

volunteer projects; and help to recruit other like-minded volunteers.

## What should you consider before launching a volunteer project or program?

In some ways, working with volunteers is quite similar to working with paid staff members. Of course, there are also some important differences.

Before working with a new volunteer or establishing a volunteer program, be able to respond to the following questions about the purpose and logistics:

- **What would you like volunteers to do?** The abstract concept of getting a volunteer to help is an appealing one. But volunteers can't be successful without knowing specifically what they are being asked to do.
- **Who will be in charge of the volunteers?** One person needs to have the responsibility of setting out work for the volunteers, reviewing that work, providing feedback—and ultimately, taking responsibility for it.
- **Where will the volunteers sit?** Do the volunteers need desk space? A computer? A processing table?
- **Do the volunteers need any special skills or abilities?** Who is best suited for this project? Should the volunteers have experience handling archival material? Will the most appropriate volunteers be knowledgeable about a particular historical topic? Do the volunteers need to be able to bend or lift objects? Can the necessary training be made available to them?
- **What sort of training will you need to provide for the volunteers to be successful?** Who will provide the training? Will you be able to offer it whenever it suits the volunteers, or will you need to hold the training at a specific time?

When volunteers come on board, make sure you welcome them. Provide a tour of your office area or facility; introduce them to other staff members; and explain organizational procedures, such as where to store coats and bags and when and where to take a lunch break.

Make sure the volunteers have all the resources necessary for the project, and let them know what to do if questions or problems arise.

Remember that one of the major differences between paid and unpaid staff is the reason they are working with your organization. No matter how much they believe in the work you do, paid staff come into work each day at least in part because they are earning money. Volunteers contribute hours for different reasons. Some volunteers are looking for opportunities to be with other people. Some are interested in networking and developing their professional skills. Some want to feel that they are making a difference by helping an organization they support. Some simply find the work to be fun. For your organization to succeed with volunteers, you'll need to make sure that you're supplying whatever each volunteer hopes to gain from spending time with you, whether that is a chance to chat with you or with others or an opportunity to try out a skill gained in graduate school. Feeling appreciated is important to all volunteers, regardless of their other motivations. As you work with volunteers, make sure that you thank them and that you express the importance of their contributions to your organization.

## What are some of the special challenges for volunteer programs at archives?

Not all employees at archives are supportive of volunteers in archives. There is a feeling among some staff, including supervisors and managers, that volunteers diminish the status of the

## Volunteers in Archives: An Overview (continued)

archival profession. Some staff fear that volunteers will replace them and take away their jobs. As a starting point, a commitment from upper management is critical.

Building trust in the volunteer program across the archives at all levels must be an ongoing effort by the volunteer program manager and all managers. Including archivists and other staff in volunteer orientation and training helps to not only build bridges by providing an opportunity for staff to share their expertise, but also for staff to get to know new volunteers and the knowledge, skills, and enthusiasm they bring to the organization. Another way to build the credibility of the volunteer program is to regularly share the successes of the volunteers and projects supervised by staff as a win for the organization.

Security at archives is critical. At government agencies, for example,

citizenship or specific types of visas and background checks may be a requirement. This process can be time consuming and costly and is part of the organization's investment in the volunteer program.

The role retired archivists play when they return as volunteers requires careful negotiation not only with the new volunteers, but also with the managers who supervised the archivists. What projects they will work on, where they will be located, and what records they will have access to are some of the issues that must be clarified before the retired archivists begin their volunteer service.

### **Are volunteer managers and project supervisors necessary at archives?**

Yes! For a volunteer program to be successful, expectations for volunteers must be clear and volunteers' expectations must be managed starting with the application process and

continuing throughout the volunteers' experience. The quality of the orientation and initial and ongoing training, as well as regular assessments, contribute to the quality of the volunteers' work and experience and, therefore, to the archives.

Project supervision ensures that volunteers receive support for the projects they work on. The well-planned volunteer projects with clear instructions from the start result in a high-quality product and satisfied volunteers who look forward to the next project.

# **Archives and Project Descriptions**

# Church History Department— Latter-Day Saints Church (LDS)

www.lds.org/churchhistory/  
Salt Lake City, Utah

*Project Title*

## Joseph Smith Papers

*Contact*

**Dan Gallup**

gallupdw@ldschurch.org  
(801) 240-8280

### Institutional Information /Purpose Statement:

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The purpose of the Church History Department is to help God's children make and keep sacred covenants by:

- Keeping and sharing a record of His Church and its people;
- Assuring remembrance of God's hand in the lives of His children; and
- Witnessing to and defending the truths of the Restoration of the gospel of Jesus Christ.

The department's core work is divided into three areas:

- Collect;
- Preserve; and
- Share.

**Collect:** The Church History Department collects all types of records and materials related to Church history. Records are collected both from Church entities and non-Church entities. These records are

acquired and cataloged to make them accessible for researchers.

**Preserve:** Proper preservation of the collection is a high priority for the department. Preservation facilities include:

- Granite Mountain Records Vault, which contains 2.4 million rolls of family history microfilm and other materials;
- Church History Library, which has twelve storage rooms that provide temperature- and climate-controlled storage for records;
- Museum storage facility, which houses objects that are used in creating exhibits for the Church History Museum; and
- Conservation Lab, which maintains and repairs items in the collection.

Additionally, due to today's increasingly automated world, systems are being put

in place to preserve digital information as well as physical records and objects.

**Share:** Church history information is shared in a variety of ways:

- Church History Library holdings accessible onsite and through our online catalog with increasing digital content;
- Church History Museum exhibits and programs;
- Historic sites; and
- Publications, such as the Joseph Smith Papers volumes.

The department is structured into six components: Administration, Library Division, Preservation Division, Museum Division, Historic Sites Division, and Publications Division. The department's staff consists of 240 employees, 15 to 30 interns, and 500 to 600 volunteers.

### Project Details

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**Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

The project is in the Publications Division of the Church History Department. The project is managed by the director of the Publications Division and the managing editor of the project. There is also an

editorial board that is the governing body for the papers project.

**How many volunteers work on the project?**

We currently have forty-two volunteers working on the project.

**If you have multiple volunteers working on the project, how do you organize them? For example, do**

**you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

We have different kinds of volunteers:

- **Academic interns:** Each semester we bring in ten to fifteen unpaid academic interns. They are assigned to assist a historian/researcher.

- **Seasoned historian/researchers:**

These volunteers work under the direction of a volume editor and the managing editor and have specific assignments to research and write about.

- **Full-time and part-time**

**missionaries:** These volunteers are members of our church who are called as missionaries for six months to two years and are assigned to assist on the project. Their work can be managed by any of the historians or writers on the project.

### How do you recruit the volunteers?

We work with the History Department at Brigham Young University (BYU) to provide academic interns on a semester basis. We invite LDS scholars to participate as volunteers. We also work through the formal missionary calling process.

### Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?

Our guidelines vary, based on the type of volunteering that the person will do.

- **Academic Interns:** We look for students in their junior or senior years of study. We also conduct interviews to ensure a good fit.
- **Seasoned historians/researchers:** These individuals need to have a PhD in an appropriate field of study, be published, and/or be an authority in areas of LDS Church history.
- **Missionaries:** We request basic computer skills and a willingness to do basic research. Some missionaries, such as retirees from the department, come with significant experience and can be given expanded responsibilities.
- All volunteers must be faithful members of the LDS faith.

### How many hours per week does each volunteer contribute to the project?

From eight to forty-plus hours per week.

### Does the project require volunteers to have a specific schedule, or is the schedule flexible?

The interns' schedules are based on their class schedules but are set during their internships.

Most volunteers work during normal work hours (8:00 a.m. to 5:00 p.m.), but the seasoned historians/writers have flexible hours that depend on their schedules. Volunteers receive access to the archives and library during normal working hours.

### Where does the work take place?

The majority of the work is done on-site in the Church History Library. Some research and writing could be done at people's homes or at BYU.

### What kinds of equipment does the project require?

Primarily computer equipment is required and is provided on-site. Other on-site equipment, including microfilm readers, is also provided.

### What kinds of tasks do the volunteers do?

Many do source checking, and others do research associated with a particular volume. Others do writing or editing.

### What kind of initial training do your volunteers receive?

Primarily, volunteers receive training on using the archives. Some need training in the use of hardware and software. Most know how to do research and are productive very quickly.

We also have standard safety training for all employees and volunteers.

### What kinds of ongoing training or written instructions do you provide?

For documentary writing projects, there is a significant amount of collaboration, discussion, and input in group settings. This provides the kind of ongoing training and direction that our volunteers need.

### How do you supervise volunteers' day-to-day work?

The employees who are directing the work of the volume supervise the day-to-day work of the volunteers.

### How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?

There are frequent reviews by the management team and volume editors. There are also reading reviews of manuscript drafts by the executive leadership as each volume develops.

### If the volunteers work with original material, how do they access this archival material?

Project employees make all requests for documents and oversee and supervise the use of the original material by the volunteers.

### How do you handle security issues?

We have very tight security guidelines and security protocols in the Church History Library. Each volunteer has an access badge that is programmed to control access throughout the library and archives.

### How do you thank the volunteers?

Appreciation is expressed by their project leaders. We recognize them in our department meetings. And the human resources director conducts an exit interview with the volunteers.

### How do you decide if the project is a success?

This is a very significant project spanning more than twenty years. Each volume is really viewed independently. Sales of the volumes are one factor, but more importantly, we look at the feedback from the scholarly community on the content and its usefulness in the study of Mormon history.



# Harry S. Truman Presidential Library and Museum

(National Archives and Records Administration)

<http://www.trumanlibrary.org/>

Independence, Missouri

*Project Title*

## Online Photograph Database

*Contact*

**Tammy Kelly**

[tammy.kelly@nara.gov](mailto:tammy.kelly@nara.gov)

(816) 268-8242

## Institutional Information

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The Harry S. Truman Library, the first presidential library to be created under the provisions of the 1955 Presidential Libraries Act, was established to preserve the papers, books, and other historical materials relating to former President Harry S. Truman and to make them available to the American people in a place suitable for exhibit and research. The core of the library's research holdings,

and the principal reason for its existence, is its collection of the papers of Harry S. Truman. At present, the library has about 15 million pages of manuscript materials in its custody, consisting principally of the White House files for the Truman Administration. They also include papers that document Truman's life and careers as a farmer, soldier, businessman, local politician, U.S. senator, vice president

and former president. In addition to its manuscript collections, the library has an audiovisual collection, and it established an oral history project in 1961 in an effort to fill the gaps in the written record. More than 13,000 researchers have visited the library's research facilities since 1959. The library is located in Independence, Missouri, President Truman's hometown.

## Project Details

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### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

Archivist and audiovisual archivist.

### **How many volunteers work on the project?**

Five to six volunteers.

### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

It depends on the volunteers' skill sets and what they like to do. As this project involves work with computers, volunteers who don't like working with technology can do research on the photos. Some

volunteers are comfortable using the scanner, but don't like having to describe photos, so they just scan and build up a pool of images that other volunteers can work from to enter descriptions. Some volunteers like to work on all aspects of the project: scanning, researching, and describing the photos.

Many of our photos come from manuscript collections, so volunteers who work on images from start to finish tend to work on those that originated in manuscript collections, and they just work on that collection—assigning accession numbers, scanning, and describing. Once they finish a collection, we get another one from our backlog and start again. We have a large backlog, but we also have a large number of photos that have already been accessioned and described. Volunteers who work on “parts” of the project tend to work with these photos. We have a volunteer who

just pulls boxes of photos in chronological accession number order and scans them, and other volunteers who then take those photos and enter the descriptions that have already been completed into the appropriate fields in our database.

### **How do you recruit the volunteers?**

When someone applies to be a volunteer, the volunteer coordinator provides a brief description of the various projects that we have available. If this description is of interest, the applicant meets with the archivist responsible, who then goes over the project in further detail.

### **Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

Yes, volunteers must be at least sixteen years old and must be either citizens of the United States, permanent residents, or holders of an A-1 or A-2 diplomatic visa.

### **How many hours per week does each volunteer contribute to the project?**

Most volunteers work at least three hours; some work for up to five hours each week.

### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

We don't require a specific schedule; however, many volunteers tend to come on specific days.

### **Where does the work take place?**

Volunteers work in the offices of the archives staff.

### **What kinds of equipment does the project require?**

The project requires computers and at least one scanner. Computer programs include the scanner software, Adobe Photoshop, and our custom-designed database program.

### **What kinds of tasks do the volunteers do?**

Volunteers undertake the following tasks:

- Assigning accession numbers (under guidance of archivists);
- Numbering photos and placing them in photo sleeves;
- Scanning photos (which are proofed by the archivists);
- Conducting research in the library's manuscript collections for information about the photos; and
- Describing the photos, either using previously written descriptions or writing them "from scratch."

### **What kind of initial training do the volunteers receive?**

We train them on photo-handling procedures, how to scan photos, and the process of entering a prewritten photo description into the database. Depending on the level of interest they express,

we then can show volunteers how to describe photos that do not already have descriptions.

### **What kinds of ongoing training or written instructions do you provide?**

We have a written process for entering photo descriptions into the database that goes through the requirements of each field step-by-step, and volunteers refer back to that. Archivists are also available to answer questions that may come up about specific photos or how to word a description.

### **How do you supervise volunteers' day-to-day work?**

When volunteers first start, every photo that is scanned is checked against the original to ensure that it is a faithful representation of the original. Once they have been scanning photos for a while, scans will be spot-checked before being added to the database. All descriptions are checked for spelling and accuracy by one of the archivists before they are verified and added to our online photograph database.

### **How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

Lists are kept of all active photo collection projects. All the lists have four fields: what photos have been scanned and how many there are; when they have been sent to the server; when the volunteer has completed description; and when they are verified by an archivist. This goes for both photos from our chronological collection and newly described photos that are removed from the backlog. The chronological list cuts off at the end of the fiscal year when the photos were originally accessioned; each backlog collection has its own list. Photos are not actually counted as being added until they are verified by an archivist.

### **If the volunteers work with original material, how do they access this archival material?**

A member of the archives staff pulls this material for volunteers. All volunteers have completed holdings security training—which is mandated by the National Archives and Records Administration—and a member of the archives staff is usually present with the volunteers when they are working on this project.

### **How do you handle security issues?**

As mentioned above, all volunteers have to complete holdings security training and have background checks and fingerprints taken. A member of the archives staff is usually present with volunteers, whether they are scanning or describing photos. Newer volunteers are typically not left alone with original materials for any length of time.

### **How do you thank the volunteers?**

Our volunteer coordinator plans various dinners and gatherings for volunteers that work in all departments, and the library participates in National Volunteer Week, when we recognize our volunteers on our website and in the museum and library lobbies.

### **How do you decide if the project is a success?**

By the continued growth of the number of photos available on our website and the shrinking of our backlog of unprocessed photos.

# Indiana Historical Society

<http://www.indianahistory.org/>  
Indianapolis, Indiana

*Project Title*

## Deaccessioning

*Contact*

**Steve Haller, Senior Director of Collections & Library**

shaller@indianahistory.org

(317) 234-0034

## Institutional Information

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The Indiana Historical Society's Library and Archives has fifteen full-time and six part-time (including paid interns) staff members. In addition, we have fifteen to twenty volunteers.

The library and archives' mission (within the IHS mission as Indiana's Storyteller) is comprised of three integral parts:

- **Collecting** materials on Indiana history from all time periods and in all archival formats.
- **Preserving** the materials for future generations.
- **Making available** the materials to anyone interested in Indiana and Midwestern history.

For more information, visit <http://www.indianahistory.org/about> or <http://www.indianahistory.org/our-collections/library-and-archives>

## Project Details

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### Where is the project located within your organizational structure, and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?

Our deaccession volunteer reports to the registrar (who reports to the senior director) and is supervised by the department administrative assistant (who reports to senior director).

### How many volunteers work on the project?

One volunteer works on this project.

### If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?

N/A

### How do you recruit the volunteers?

Responsibility for recruiting volunteers falls to the volunteer coordinator in human resources.

### Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?

We restrict volunteering to adults. Additionally, prospective volunteers must have skills that match the job description and the physical requirements of the position. Our human resources office conducts a background check.

### How many hours per week does each volunteer contribute to the project?

The volunteer spends about four hours per week on the project.

### Does the project require volunteers to have a specific schedule, or is the schedule flexible?

Volunteers must keep a specific schedule.

### Where does the work take place?

The volunteering is performed in an open office area and in deaccession storage.

### What kinds of equipment does the project require?

A computer and telephone are used.

### What kinds of tasks do the volunteers do?

Volunteers' work is directed by the department administrative assistant under the registrar's supervision. Using preapproved lists, volunteers enter inventories of deaccessioned items into a spreadsheet. Volunteers then search for prospective new homes (in-state or out-of-state) for the deaccessioned items. Initial contacts are then made by either email or telephone to gauge interest in the items. Prospective new homes are reviewed with the registrar for appropriateness. Volunteers also assist the administrative assistant in packing and shipping approved materials.

**What kind of initial training do you provide the volunteers?**

Volunteers are trained in inventory control and mail room operations as needed.

**What kinds of ongoing training or written instructions do you provide?**

N/A

**How do you supervise volunteers' day-to-day work?**

The registrar checks and reviews all work.

**How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

The senior director periodically monitors results with the registrar and administrative assistant.

**If the volunteers work with original material, how do they access this archival material?**

Not applicable, since volunteers use duplicate material.

**How do you handle security issues?**

We use a badge access system.

**How do you thank the volunteers?**

HR has an annual event to thank volunteers. We also often informally thank our volunteers.

**How do you decide if the project is a success?**

Success is visible when there is an increase in the available space for new collections.



# Indiana Historical Society

<http://www.indianahistory.org/>

*Project Title*

## Oral History Transcriptions

*Contact*

**Steve Haller, Senior Director of Collections & Library**

shaller@indianahistory.org

(317) 234-0034

## Institutional Information

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The Society's Library and Archives has fifteen full-time and six part-time (including paid interns) staff members. In addition, we have fifteen to twenty volunteers.

The Library and Archives mission (within IHS mission as Indiana's Storyteller) is comprised of three integral parts:

- **Collecting** materials on Indiana history from all time periods and in all archival formats
- **Preserving** the materials for future generations
- **Making available** the materials to anyone interested in Indiana and Midwestern history

For more information, visit <http://www.indianahistory.org/about> or <http://www.indianahistory.org/our-collections/library-and-archives>.

## Project Details

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### Where is the project located within your organizational structure, and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?

Oral history transcription volunteers report to the director of manuscript and visual collections (who reports to the senior director).

### How many volunteers work on the project?

One or two volunteers help with transcriptions.

### If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?

The volunteers work on different days and on separate projects.

### How do you recruit the volunteers?

The human resources volunteer coordinator recruits volunteers.

### Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?

The volunteer must be an adult, must have skills that match the job description, must undergo a background check by HR, etc.

### How many hours per week does each volunteer contribute to the project?

Each volunteer spends about four hours per week on the project.

### Does the project require volunteers to have a specific schedule, or is the schedule flexible?

Volunteers must keep a specific schedule.

### Where does the work take place?

The volunteering is performed in an open office area.

### What kinds of equipment does the project require?

Transcribing oral histories requires a computer and audio transcription devices (the specific type depends on whether the media is tape or digital).

### What kinds of tasks do the volunteers do?

These volunteers listen to recordings of oral histories and transcribe what they hear.

### What kind of initial training do the volunteers receive?

Volunteers are trained on equipment use and editorial standards.

### What kinds of ongoing training or written instructions do you provide?

N/A

**How do you supervise volunteers' day-to-day work?**

The director checks work from time to time.

**How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

The director checks work from time to time.

**If the volunteers work with original material, how do they access this archival material?**

Not applicable, since volunteers use duplicate material.

**How do you handle security issues?**

Volunteers use a badge access system.

**How do you thank the volunteers?**

HR has an annual event to thank volunteers. We also informally thank them often.

**How do you decide if the project is a success?**

An increase in accessible oral histories indicates that the project was a success.

# National Archives at College Park

(National Archives and Records Administration)  
<http://www.archives.gov/dc-metro/college-park/>  
 College Park, Maryland

*Project Title*

## Online Indexing of Vietnam Unit Awards (4 Series) for Fold3.com Digitization Project

*Contacts*

### **Mary Rephlo, NARA Liaison with Fold3.com**

mary.rephlo@nara.gov

### **Cliff Snyder, Supervisory Archivist**

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### **Judy Luis-Watson, Volunteer Coordinator**

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(301) 837-3002

## Institutional Information

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The National Archives at College Park is the largest modern archives in the world. We have approximately six hundred employees, two hundred contractors, as well as seventy-five volunteers. The building houses textual and microfilm records from most federal government civilian agencies, army records dating

from World War I, naval records dating from World War II, still pictures, motion pictures, sound and video records, cartographic and architectural holdings, as well as electronic records.

The National Archives and Records Administration (NARA) comprises

forty-seven facilities nationwide that include our records centers, regional archives, Presidential libraries, and the Office of the Federal Register. Nationwide at NARA, we have approximately 3,000 employees and 1,600 volunteers.

## Project Details

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### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

This project was completed in 2010. The lead volunteer worked with the volunteer coordinator who communicated with our NARA representative when we needed more immediate technical assistance from our partner organization Fold3.com. The archivist responded to any issues regarding the original records and scanned images.

### **How many volunteers work on the project?**

A team of five volunteers collaborated on this project.

### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

On a printed sheet, volunteers signed up for a box to work on, indicating the date. At the end of the day, they indicated whether or not they had completed the box or were in progress. When working online, they signed up and selected a section of records to index. The lead volunteer coordinated this team project in collaboration with the volunteer coordinator.

### **How do you recruit the volunteers?**

Volunteers find us through our website [www.archives.gov](http://www.archives.gov), [www.volunteermatch.org](http://www.volunteermatch.org), and by word of mouth. We also list our volunteer opportunities on websites of adjacent cities in Maryland.

The volunteer coordinator discussed this project with several volunteers whose technical skills and interests matched the project. While two volunteers emerged as potential leads, one agreed to serve as the lead volunteer and stayed with the project to completion. All the volunteers were already a part of the volunteer corps and were delighted to undertake this project. For most of them, this was just one of the projects they worked on regularly.

### **Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

Volunteers must be comfortable with computers and be very detail-oriented. All NARA volunteers must be at least sixteen years of age. Volunteers also must be U.S. citizens, legal resident aliens, or holders of a type A1 or A2 diplomatic visa.

### **How many hours per week does each volunteer contribute to the project?**

Most volunteered four to six hours a week. The lead volunteer was able to work at home and contributed many hours off-site.

### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

Schedules were flexible.



Robert Gaugler, lead volunteer for the Online Indexing of Vietnam Unit Awards for Fold3.com Digitization Project. Courtesy of the National Archives at College Park, MD. 2012.

### **Where does the work take place?**

Volunteers worked mostly in the volunteer office, which is a processing space, but sometimes also at home.

### **What kinds of equipment does the project require?**

Computers with Internet access have to meet the specifications of the partnering organization [iarchives.com](http://iarchives.com).

### **What kinds of tasks do the volunteers do?**

- **Box review:** Compare the computer images with the contents of the box to determine if there are any pages in the box that were not scanned or are out of order.
- **Image Quality:** Check that image quality is comparable to the actual document and that the image is properly centered in the black border space.
- **Metadata Entry:** Enter the three elements identifying the award using the keyboard: 1) Award type, 2) Unit Designation, 3) Date-year

### **What kind of initial training do you provide the volunteers?**

All volunteers participate in sixteen hours of orientation to the National Archives, as well as training in holdings maintenance and records handling, and holdings protection.

### **What kinds of ongoing training or written instructions do you provide?**

For this project, Fold3.com staff conducted an on-site training using their software for a group of volunteers as well as staff overseeing the project. As the project evolved, the lead volunteer in collaboration with the volunteer coordinator prepared written instructions for the team.

### **How do you supervise volunteers' day-to-day work?**

The volunteer coordinator worked closely with the lead volunteer to oversee production. They provided updates to archival staff.

### **How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

The lead volunteer regularly provided status updates and informed the volunteer coordinator of technical issues that needed to be resolved. Regular

project updates allowed staff to track the progress of the project.

### **If the volunteers work with original material, how do they access this archival material?**

In some cases, the archivist delivered the boxes of records after they had been scanned by Fold3.com staff in the research facility. At other times, the lead volunteer or volunteer coordinator picked up the boxes from the research facility. Since the volunteer office is a secure processing space, the boxes were stored in the room during the project. The supervising archivist delivered the boxes back to the stacks.

### **How do you handle security issues?**

All volunteers undergo a federal background investigation (National Agency Check of Inquiries). In addition, for this project, the sign-out sheet and the database kept a record of which volunteer worked on which box and when the box was completed. Other volunteers and staff work in close proximity, which supports good security and records-handling practices.

### **How do you thank the volunteers?**

We make a practice of expressing gratitude and words of encouragement to each volunteer on a daily basis. We celebrate volunteers at a luncheon, a thank-you party during National Volunteer Week, occasional "milestones" celebrations, as well as smaller socials. Volunteers also receive a 20 percent discount at the archives' store.

### **How do you decide if the project is a success?**

This project comprising 119 boxes, for example, was completed to the satisfaction of NARA staff as well as Fold3.com staff, and researchers have been using the data online. The work exceeded expectations because of the keen attention to detail of the team and the lead volunteer's dedication and patience.



# National Archives at College Park

(National Archives and Records Administration)  
<http://www.archives.gov/dc-metro/college-park/>  
 College Park, Maryland

## Project Title

## Rearrange and Re-label Record Group 407, WWII Operations Reports File Units, Entry 427F – Country Files, 1941–1948

## Contact

**Becky Collier, Supervisory Archivist**

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 (301) 837-1601

## Institutional Information

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The National Archives at College Park is the largest modern archives in the world. We have approximately six hundred employees, two hundred contractors, as well as seventy-five volunteers. The building houses textual and microfilm records from most federal government civilian agencies, army records dating

from World War I, naval records dating from World War II, still pictures, motion pictures, sound and video records, cartographic and architectural holdings, as well as electronic records.

The National Archives and Records Administration (NARA) comprises

forty-seven facilities nationwide that include our records centers, regional archives, presidential libraries, and the Office of the Federal Register. Nationwide at NARA, we have approximately 3,000 employees and 1,600 volunteers.

## Project Details

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### Where is the project located within your organizational structure, and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?

This project was completed in 2011. The reference supervisory archivist provided training and supervised the project.

### How many volunteers work on the project?

One volunteer worked on this project.

### If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?

N/A

### How do you recruit the volunteers?

Volunteers find us through our website, [www.archives.gov](http://www.archives.gov), [www.volunteermatch.org](http://www.volunteermatch.org), and via word of mouth. We also list our volunteer opportunities on websites of adjacent cities in Maryland.

The volunteer coordinator discussed this project with the volunteer because it matched the person's skill level and interest. The volunteer who was already on board and working on other projects was delighted to undertake this project.

### Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?

The volunteer had to have a background in archival practices and experience with arrangement projects. NARA volunteers must be at least sixteen years of age. They also must be U.S. citizens, legal resident aliens, or holders of a type A-1 or A-2 diplomatic visa.

### How many hours per week does each volunteer contribute to the project?

This volunteer contributed about eight to twelve hours per week to this project.

### Does the project require volunteers to have a specific schedule, or is the schedule flexible?

The schedule was flexible.

### Where does the work take place?

The volunteer worked in the volunteer office, which is a secure processing space, and in the stacks where this record group is stored.

### What kinds of equipment does the project require?

A computer with appropriate software and access to shared drives, as well as labels for boxes, were required.

### What kinds of tasks do the volunteers do?

- Volunteers completed the following tasks:
  - Identify contents of folders;
  - Update folder titles to reflect contents and include country name first;
  - Provide new folder list with proposed title changes to archivist;
  - Based on agreement, rearrange records alphabetically by name of country and thereunder, alphabetically by type of record;
  - Re-label boxes to reflect new arrangement; and
  - Provide archivist with electronic version of folder listing and box listing reflecting new arrangement.

### What kind of initial training did the volunteers receive?

All volunteers participate in sixteen hours of orientation to the National Archives and receive training in holdings maintenance and records handling as well as holdings protection.

### What kinds of ongoing training or written instructions do you provide?

For this project, the archivist explained the project within its larger context,

instructed the volunteer on the location of the records, and was available to answer any questions.

### How do you supervise volunteers' day-to-day work?

The volunteer coordinator supervised the day-to-day work and served as liaison between the volunteer and archivist. The volunteer also provided regular updates to the archivist.

### How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?

Regular conversations with the volunteer enabled the volunteer coordinator to provide advice and keep track of the project's progress. Regular project updates allowed the archivist to ensure that the project was being done correctly.

### If the volunteers work with original material, how do they access this archival material?

The volunteer had access to the stacks in which the records were stored.

### How do you handle security issues?

All volunteers undergo a background investigation (National Agency Check of Inquiries). Stack access is only

provided to a volunteer for the time that the individual works on a project that requires access to the records. The supervisory archivist requests stack access for volunteers. Original records are stored in the volunteer office, which is a secure processing space. Other volunteers and staff work in close proximity, which supports good security and records handling practices. When exiting the building, volunteers, like staff, go through a bag search.

### How do you thank the volunteers?

We make a practice of expressing gratitude and words of encouragement to each volunteer on a daily basis. We celebrate volunteers at a luncheon, a thank-you party during National Volunteer Week, occasional "milestones" celebrations, as well as smaller socials. Volunteers also receive a 20-percent discount at the archives' store.

### How do you decide if the project is a success?

This project was completed to the satisfaction of the supervising archivist, and the records are accessible to researchers and staff.



Cassie Ghee, docent and lead volunteer for the ongoing Volume Preservation Project, with records of foreign service posts. *Courtesy of the National Archives at College Park, MD. 2008.*

Howard Waterworth is part of a large team of volunteers processing and conducting holdings maintenance on the records of the American Expeditionary Forces — World War I. *Courtesy of the National Archives at College Park, MD. 2012.*

Lisa Covi, docent and staff aide, has volunteered on several projects, including an item-level finding aid of Panama Canal applications for photo-metal checks and a box listing of World War II operations reports. *Courtesy of the National Archives at College Park, MD. 2012.*

Robin Brown is part of a team of volunteers developing an item-level finding aid of the 101st Airborne Division Awards case files during the Vietnam War. *Courtesy of the National Archives at College Park, MD. 2012.*

Sarah Barton, docent and staff aide, has volunteered on several archival projects, including researching and writing letters in response to reference requests. She has served on the board of the National Archives Volunteer Association. *Courtesy of the National Archives at College Park, MD. 2011.*

# National Archives at Fort Worth

(National Archives and Records Administration)

<http://www.archives.gov/southwest/>

Fort Worth, Texas

*Project Title*

## Assisting Patrons

*Contact*

**Jenny Sweeney, Education Specialist**

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(817) 831-5917

## Institutional Information

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The National Archives at Fort Worth is made up of two facilities: the John Burgess facility, where we hold our original records, and the Montgomery Plaza facility, where we have a research

room with public access computers and microfilm readers. The Montgomery Plaza facility is mainly used by genealogy researchers. Altogether, we have nine full-time employees and two part-time

student employees. We have more than 115 cubic feet of federal records from Texas, Oklahoma, Louisiana, and Arkansas.

## Project Details

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### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

The education specialist oversees this project at our Montgomery Plaza location.

### **How many volunteers work on the project?**

Seventeen volunteers work on this project.

### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

The work is organized according to day — the volunteers each do the same kinds of work and just pick up where the others left off.

### **How do you recruit the volunteers?**

Our recent opening of Montgomery Plaza required us to recruit volunteers. There was an article about the opening of the space in our local paper, and the writer made note that we would need volunteers. This is how we got the majority of our volunteers, and most of them help patrons with family history research. The special projects volunteers all started out helping patrons and either asked for further responsibility, or we thought they would be good on the specific project and asked them if they would be interested.

We gain volunteers when individuals inquire about volunteering. Otherwise, we have not done any active recruiting lately.

### **Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

Volunteers must be at least sixteen years old and must be either citizens of the United States, permanent residents, or

holders of an A-1 or A-2 diplomatic visa. Also, we ask that each volunteer works at least a four-hour shift per week.

### **How many hours per week does each volunteer contribute to the project?**

Generally the volunteers work four hours a week.

### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

The schedule is flexible.

### **Where does the work take place?**

Volunteers who work with patrons help at our Montgomery Plaza facility.

### **What kinds of equipment does the project require?**

N/A

### **What kinds of tasks do the volunteers do?**

Most of our volunteers assist patrons with family history research. They also greet patrons, answer the phones when



necessary, and help with any other minor tasks that arise.

Two volunteers also work on creating an index for naturalizations in several of the Texas courts. The education specialist oversees this project.

We have one volunteer who works mostly on research and creating text for an upcoming online exhibit and blog. The archives director and education specialist jointly oversee this project.

### **What kind of initial training do the volunteers receive?**

The initial training relates to what the National Archives is and what type of work we do. We also provide them with training on the holdings in our region that are most used, such as the Dawes records.

### **What kinds of ongoing training or written instructions do you provide?**

We periodically provide training related to specific records, such as the recent release

of the 1940 Census, etc. We provide them with finding aids.

Some upcoming training on Dawes records will include exercises for them to practice using Native American records.

### **How do you supervise volunteers' day-to-day work?**

We check in on them to see if they need anything. If there is something that they need, they are welcome to come to us at any time.

### **How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

We periodically check in on the volunteers and look at the work they are doing. We spot-check for quality control on the projects.

### **If the volunteers work with original material, how do they access this archival material?**

N/A

### **How do you handle security issues?**

Volunteers at our Montgomery Plaza work with microfilm and public access computers, so there are no records security issues.

### **How do you thank the volunteers?**

We recently held a Volunteer Appreciation Extravaganza where we had a potluck luncheon and gave the volunteers certificates of appreciation and NARA volunteer pins. Throughout the year, we provide them with little treats and notes of thanks.

### **How do you decide if the project is a success?**

Success is reached when the project is complete.



Volunteer Bunnye Porter assists a patron in the Genealogical Research Room. *Courtesy of the National Archives at Fort Worth.*



The Montgomery Plaza facility of the National Archives at Fort Worth. *Courtesy of the National Archives at Fort Worth.*



Volunteer Lonny Porter gives a helping hand to a visitor at the Genealogical Research Room. *Courtesy of the National Archives at Fort Worth.*



# National Archives at Fort Worth

(National Archives and Records Administration)

<http://www.archives.gov/southwest/>

Fort Worth, Texas

*Project Title*

## Processing Confederate Court Records

*Contact*

**Jenny Sweeney**

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(817) 831-5917

## Institutional Information

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The National Archives at Fort Worth is made up of two facilities: the John Burgess facility, where we hold our original records, and the Montgomery Plaza facility, where we have a research

room with public access computers and microfilm readers. The Montgomery Plaza facility is mainly used by genealogy researchers. Altogether, we have nine full-time employees and two part-time

student employees. We have more than 115 cubic feet of federal records from Texas, Oklahoma, Louisiana, and Arkansas.

## Project Details

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### Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?

The archives director oversees this project at the John Burgess facility.

### How many volunteers work on the project?

Two volunteers help process Confederate court records.

### If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?

The work is organized according to day — the volunteers each do the same kinds of work and just pick up where the others left off.

### How do you recruit the volunteers?

We gain volunteers when individuals inquire about volunteering. We have

not otherwise done any active recruiting lately.

### Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?

Volunteers must be at least sixteen years old and must be either citizens of the United States, permanent residents, or holders of an A-1 or A-2 diplomatic visa. Also, we ask that each volunteer works at least a four-hour shift per week.

### How many hours per week does each volunteer contribute to the project?

Generally the volunteers work four hours a week.

### Does the project require volunteers to have a specific schedule, or is the schedule flexible?

The schedule is flexible.

### Where does the work take place?

The Textual Research Room at our John Burgess facility.

### What kinds of equipment does the project require?

They are currently taking notes on information from court cases and key that information into a database on a National Archives computer. The work also requires folders, boxes, etc.

### What kinds of tasks do the volunteers do?

These volunteers physically process records and then record from them the information we need to create an index of the records.

### What kind of initial training do volunteers receive?

The initial training relates to what the National Archives is and what type of work we do.

### What kinds of ongoing training or written instructions do you provide?

N/A

**How do you supervise volunteers' day-to-day work?**

We check in on them to see if they need anything. If there is something that they need, they are welcome to come to us at any time.

**How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

We periodically check in on the volunteers and look at the work they are doing. We spot-check for quality control on the projects.

**If the volunteers work with original material, how do they access this archival material?**

Archivists or archives technicians pull the records for them. They use this material in the Textual Research Room just as any researcher would.

**How do you handle security issues?**

Luckily, we have not had any security issues with volunteers. Since they are using the archival materials in the research room, they are monitored just like regular researchers.

**How do you thank the volunteers?**

We recently held a Volunteer Appreciation Extravaganza where we had a potluck luncheon and gave the volunteers certificates of appreciation and NARA volunteer pins. Throughout the year, we provide them with little treats and notes of thanks.

**How do you decide if the project is a success?**

Completion of the project indicates that it is a success.

# National Archives Building

<http://www.archives.gov/dc-metro/washington/>  
(National Archives and Records Administration)  
Washington, D.C.

*Project Title*

## Indexing Bounty Lands Records

*Contact*

**Rebecca Martin**

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(202) 357-5272

## Institutional Information

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The National Archives Building is located in downtown Washington, D.C. One of more than three dozen facilities operated by the National Archives and Records Administration, the National Archives Building is the agency's first home. Constructed in the 1930s, the structure

is located near the National Mall and houses the Declaration of Independence, the Constitution, and the Bill of Rights. More than one million people visit the site's exhibits each year. The National Archives Building holds Executive Branch records related to the Civil War, Japanese-

American internment during World War II, immigration, and much more. It also holds the records of Congress and the Supreme Court. Approximately 300 federal employees, 260 volunteers, and 30 interns work in the building, as well as several dozen contractors.

## Project Details

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### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

The project is under the supervision of the processing staff. The volunteer coordinator recruits volunteers for the project, and one of the archival processing staff members oversees the day-to-day work.

### **How many volunteers work on the project?**

Fifteen volunteers work on the project.

### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

All the volunteers share one computer. Each volunteer is assigned a two-hour shift, and three shifts are scheduled each

day. The supervising staff member pulls boxes of records from the stacks. At the beginning of each shift, the volunteer finds the marker left in the active box by the last volunteer. Then the volunteer pulls the file behind the marker, enters the relevant data, and replaces the folder in the box. When the folder goes back in the box, it is in front of the marker. In this way, each subsequent volunteer picks the work up where the previous person ended. To keep track of which volunteer entered which data, each person working on the project completes a log at the beginning and end of each shift. The log lists the number of the first file the person entered that day, the number of the last file he or she entered, the volunteer's name, and the date.

### **How do you recruit the volunteers?**

We recruit volunteers through our website, by word of mouth, through postings on [www.volunteermatch.org](http://www.volunteermatch.org), in local libraries, and in local newspapers.

### **Do you have any restrictions on**

### **who may participate (minimum or maximum age, education, experience, or other)?**

Yes, each volunteer must be at least sixteen years old and must be either a United States citizen, a permanent resident, or a holder of an A-1 or A-2 diplomatic visa.

### **How many hours per week does each volunteer contribute to the project?**

Each volunteer commits to one two-hour shift. Occasionally, if a slot is open because of another volunteer's vacation or illness, someone picks up an additional shift.

### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

Because all the volunteers who contribute to this project share one computer, each person's time is strictly scheduled. Each volunteer is assigned a specific day of the week and, within that day, a two-hour slot.

**Where does the work take place?**

The work is done in one of our processing rooms.

**What kinds of equipment does the project require?**

The project requires a desk with enough surface space for safely examining a case file, a computer, a pencil, a sheet for marking where each volunteer starts and ends within a shift, and an acid-free piece of card-stock for marking where the volunteer is within a box.

**What kinds of tasks do the volunteers do?**

The volunteer removes one file at a time from a box. The volunteer then types information that is written on the outside of the file (the name of the applicant, the name of the person's commanding officer, etc.) into an Access database. If there seems to be a problem with the information recorded on the outside of the file, then the volunteer opens the file and examines the original nineteenth-century records. When finished with the file, the volunteer returns it to the box and removes the next file.

**What kind of initial training do the volunteers receive?**

Each volunteer participates in a sixteen-hour orientation course. Then the

volunteer works with a veteran of the project. Each volunteer for the project also receives document handling training via the Preservation Program Division.

**What kinds of ongoing training or written instructions do you provide?**

Each volunteer receives an instruction sheet, and a copy of the sheet is located at the work station. If additional training is needed, the lead volunteers identify the need and provide the training.

**How do you supervise volunteers' day-to-day work?**

Two volunteers serve as leads; they regularly check the work of new volunteers. Then, after the volunteers have settled into the project, they periodically check the work.

**How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

The lead volunteers perform quality checks. The files are in alphabetical order by the name of the applicant. Progress is noted as the volunteers move through the alphabet. Because of the scale of the project, progress can feel slow. For instance, it took more than one year to enter the files from the letter H.

**If the volunteers work with original material, how do they access this archival material?**

A staff member pulls the boxes from the stacks, keeps them in a secure processing space when they are in use, and refiles them in the stacks.

**How do you handle security issues?**

All volunteers undergo a federal background check; the work is done in a secure processing area to which access is limited, no volunteer is ever alone in the work space, and all volunteers participate in exit screening when leaving the building.

**How do you thank the volunteers?**

We hold two big events during the year and lots of small ones. We also verbally say thank you every time we see the volunteers, and we offer benefits, such as a 20 percent discount in our museum shop.

**How do you decide if the project is a success?**

The project is successful if use of these records increases.



# Oregon Jewish Museum

<http://www.ojm.org/>  
Portland, Oregon

*Project Title*

## Congregation Beth Israel Project

*Contact*

**Pete Asch**

pete@ojm.org  
(503) 226-3600

### Institutional Information

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The Oregon Jewish Museum (OJM), the Pacific Northwest's only Jewish museum, was founded in 1989 to examine and preserve the rich cultural heritage of one of Oregon's earliest immigrant groups, to bring innovative traveling exhibitions and Jewish programs to the region, and

to build a dynamic institution embracing Jewish identity and community. OJM's mission is dedicated to the preservation, research, and exhibition of art, archival materials, and artifacts of the Jewish people. It is the repository for archival documents, artifacts, and photographs

concerning the history of the Jews in Oregon, and endeavors to discover and collect all materials that may help to illuminate this history.

We currently have a staff of four full-time employees and a part-time archivist.

### Project Details

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#### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

The project is overseen by the archivist and the curator of the collections.

#### **How many volunteers work on the project?**

Fifteen volunteers work on this project.

#### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

The volunteers are divided into teams of two or three. The materials are prepared by the archivist into rudimentary series, and each team is assigned a series or subseries to work on. They are given one box at a time and receive training in archival processing.

#### **How do you recruit the volunteers?**

N/A

#### **Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

We do not have restrictions, but due to the high number of community volunteers, we have begun to limit participants to those with either archival experience or significant knowledge of the congregation or community.

#### **How many hours per week does each volunteer contribute to the project?**

Each volunteer spends about four hours per week on the project.

#### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

We ask that the volunteers work while the archivist is present.

#### **Where does the work take place?**

The work takes place at a group processing table in the archives room.

#### **What kinds of equipment does the project require?**

The volunteers are responsible for processing only materials that have been accessed by the archivist and treated for any significant preservation and conservation problems. Volunteers organize materials and put them into folders and boxes.

#### **What kinds of tasks do the volunteers do?**

Volunteers process materials, identify photographs, and provide valuable insight into the history of the collection (since many have been members of the congregation for fifty or more years).

### **What kind of initial training do the volunteers receive?**

Each new volunteer receives one day of training in archival processing practices and is always paired with a volunteer who has several years of experience.

### **What kinds of ongoing training or written instructions do you provide?**

Each mini project (one box) is introduced one at a time and quickly reviewed at the start and completion. I remain accessible for any questions that arise, and when several questions crop up, I hold meetings with the entire crew or individual teams to address them.

### **How do you supervise volunteers' day-to-day work?**

My office is adjacent to where they work, and I regularly check their work throughout the day. In addition, I meet with the volunteers at the start and end of their shifts.

### **How do you manage the project? For example, how do you track and report the project's progress and how do you ensure quality control?**

I use Excel reports to track what everyone is working on and how much they have processed over time. In addition, I go through each box upon completion to ensure quality control.

### **If the volunteers work with original material, how do they access this archival material?**

They are given materials one box at a time to work with.

### **How do you handle security issues?**

Materials must remain in the processing area, and volunteers are not assigned to work with any collections having restrictions or sensitive information.

### **How do you thank the volunteers?**

There is no official compensation policy, but we give holiday gifts and other small examples of our gratitude.

### **How do you decide if the project is a success?**

We consider the project a success once the collection has been entirely processed and turned over to the archivist for final arrangement and description.



Members of the National Council of Jewish Women, who are assisting with the Congregation Beth Israel Project. *Courtesy of the Oregon Jewish Museum.*

# Providence Archives, Mother Joseph Province

<http://www2.providence.org/phs/archives/Pages/default.aspx>  
Seattle, Washington

*Project Title*

## Exploring the Archival Profession

*Contact*

**Loretta Zwolak Greene, Archivist**

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(206) 923-4010

## Institutional Information

Providence Archives preserves the historical records of the religious community of the Sisters of Providence of Mother Joseph Province and the more than 120 active and inactive institutions comprising Providence Health and Services (Alaska, California, Idaho, Montana, Oregon, and Washington). The collections document the Sisters of Providence and the development and administration of education, health care, and social services in the West from 1856 to the present.

The archives consists of manuscript and printed material including chronicles, correspondence, minutes, patient and student ledgers, financial records, and publications; more than fifty thousand images, films, audiotapes, and a wide range of artifacts representing the religious community and institutional history. An important collection is the Personal Papers of Mother Joseph of the Sacred Heart (Esther Pariseau), 1823–1902, foundress of the Sisters of Providence in the West, and records relevant to the Mother Joseph Statue in Statuary Hall, Washington, D.C.

Our website is <http://www2.providence.org/phs/archives/Pages/default.aspx>, and digital collections are accessed through <http://providencearchives.contentdm.oclc.org>. A newsletter, *Past Forward*, is published quarterly.

Four staff members service the archival collections and carry out archival responsibilities. These positions are archivist, associate archivist, visual resources archivist, and archives assistant-technical.

## Project Details

### Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?

This volunteer's experience is overseen by the associate archivist.

### How many volunteers work on the project?

One volunteer works on this project; this volunteer is interested in the archival profession so would like to experience different facets of archival work.

### If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day;

### does each volunteer work on an independent piece of the project?

N/A

### How do you recruit the volunteers?

Volunteers connect with the archives through contact at professional meetings in the Seattle region, through a formal volunteer program associated with our facility, and by referral from archival colleagues.

### Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?

The individual must be at least sixteen years old, willing to work in the archives, perform duties as instructed, and take direction from staff.

### How many hours per week does each volunteer contribute to the project?

The volunteer contributes seven hours (a full day) per week.

### Does the project require volunteers to have a specific schedule, or is the schedule flexible?

Hours are flexible within the archives' normal hours.

### Where does the work take place?

Volunteers work in the Processing Room and Reference Room within the archives facility.

### What kinds of equipment does the project require?

Computer, networked to a printer, digital camera, archival supplies, and office supplies.

### What kinds of tasks do the volunteers do?

The purpose of this volunteer's efforts (to experience the archival profession) enables the staff to assign small, easily accomplished projects for which the staff does not have time. The projects began with tasks to orient the volunteer to the content and organization of the archival collections and are progressing in complexity.

Planned and completed tasks include filing archival records into respective collections, sorting and identifying photographs, entering legacy accession records into our in-house database, processing a small collection, and creating a finding aid.



Sr. Virginia Miller, SP, a volunteer for Providence Archives who has been transcribing handwritten Chronicles from the many institutions of Providence. *Photo by Peter Schmid, Seattle, Washington. 2012.*

### What kind of initial training do you provide the volunteers?

We give a tour of the archives and collections and an explanation of planned projects so that the volunteer can select projects he or she is most interested in.

### What kinds of ongoing training or written instructions do you provide?

- A detailed orientation to the history and ministry of the Sisters of Providence through DVDs and written histories;
- Printed volunteer manual that covers basic topics, such as hours and contact information, as well as specific directions for arranging and describing collections and references to archival literature;
- Basic Manual Series published by the Society of American Archivists; and
- Verbal instructions related to the task at hand.

### How do you supervise volunteers' day-to-day work?

The volunteer checks in with staff members in the morning and throughout the day as needed. A staff member checks in with the volunteer periodically throughout the day as well.

### How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?

The volunteer completes a daily time log and notes what was accomplished. A staff member checks the volunteer's work and provides input.

### If the volunteers work with original material, how do they access this archival material?

A staff member gives the original material to the volunteer. Projects in process are temporarily stored on shelves in the Processing Room.

### How do you handle security issues?

Volunteers do not have access to confidential information in archival records. They do not have access keys to the archives. They are assigned a corporate login and email address, allowing them access to the working files on the archives' network drive.

### How do you thank the volunteers?

The archives staff is small (three), so we try to create a welcoming environment and include the volunteer in holiday celebrations or other departmental events. We welcome each volunteer with a simple gathering (coffee, pastries) to introduce and get to know the person.

### How do you decide if the project is a success?

The individual projects are chosen so that success is likely. As mentioned previously, the volunteer is given progressively more challenging tasks that best suit his or her interests. Communication is the key to success—projects that might be less than successful can be kept on track or modified as needed.



# Shelburne Museum Archives

<http://shelburnemuseum.org/>  
Shelburne, Vermont

*Project Title*

## Archives Appraisal and Processing

*Contact*

**Polly Darnell, Archivist**

[pdarnell@shelburnemuseum.org](mailto:pdarnell@shelburnemuseum.org)

(802) 985-3346 ext. 3379

## Institutional Information

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Located in Vermont's scenic Lake Champlain Valley, Shelburne Museum is one of the nation's finest, most diverse, and unconventional museums of art, design, and Americana. More than 150,000 works are exhibited in a remarkable setting of 37 exhibition buildings, 25 of which are historic and were relocated to the museum grounds.

The museum's collection includes works by the great Impressionist painters Claude Monet, Edouard Manet, and Edgar Degas as well as a prized collection of folk art, including trade signs, weathervanes,

and quilts. In addition, there are daily demonstrations at blacksmith and print shops, and tours of the historic steamboat *Ticonderoga*, along with rides on a genuine 1920s carousel.

The museum has a year-round staff of fifty-six, with more than one hundred seasonal employees.

Shelburne Museum's Archives Program was established with a grant from the Henry Luce Foundation in 1995 to document the activities, aspirations, and collections of museum founder Electra Havemeyer Webb, an early collector of

American folk and decorative arts, and to initiate an ongoing archives and records management program to preserve vital records of the museum for administrative use and for historical research. In addition, it cares for related collected records, such as the papers of artist Ogden M. Pleissner, the letters of P.T. Barnum, the nineteenth-century account books of Vermont general stores and blacksmiths, and the letters of Mary Cassatt.

The archives and library are jointly staffed by one full-time employee and four volunteers.

## Project Details

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### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

The archives is part of the Curatorial Department. The archivist/librarian oversees archives (and library) volunteers.

### **How many volunteers work on the project?**

Currently, two longtime volunteers work on sequential archives appraisal and processing projects.

### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day;**

### **does each volunteer work on an independent piece of the project?**

Currently, each volunteer has his own project, and they work independently of each other. When new volunteers join us, they are paired with an experienced volunteer who can help train them and alert me when a newcomer needs more information or closer supervision.

### **How do you recruit the volunteers?**

The museum has an active volunteer program in which almost all departments participate. Volunteers are recruited mainly by word of mouth, or they approach us if they are interested in our museum or in gaining experience, such as a college student wanting experience in the archives to help her decide whether

to pursue an archives career. We have more people wanting to volunteer in the archives than I can supervise or use. Some volunteers work as guides at the museum during the open season. A nearby retirement community, area colleges, and an active senior population contribute to our volunteer pool. Many hear about our volunteer program from existing volunteers.

(The best recruiting job I've done occurred while I was teaching a six-week course on doing research in the archives for a previous job. Many students who had specific projects that they wanted to work on attended the course because it was for a defined period that included research time. I recruited several volunteers from the class.)

### **Do you have any restrictions on who may participate (minimum age, education, experience, or other)?**

The museum accepts volunteers over the age of sixteen (or younger ones accompanied by an adult) for some positions. The archive has no formal restrictions. My preferences depend upon the specific project and whether it is finite or ongoing.

### **How many hours per week does each volunteer contribute to the project?**

One volunteer works nine hours (three mornings) per week and the other works three hours per week, with summers off.

### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

The schedule is flexible, though I try to have all volunteers work in the morning, which most of them prefer, so that I do not have to be available at all times.



Shelburne Museum Archives volunteer Stan Shannon helping process a collection. *Photo courtesy of Shelburne Museum Archives. © Shelburne Museum, Shelburne, Vermont, 2009.*

### **Where does the work take place?**

Volunteers are stationed in the reading room.

### **What kinds of equipment does the project require?**

To complete their work, volunteers need a big table and a computer, and they sometimes use a scanner. They also need carts to store and move projects in progress.

### **What kinds of tasks do the volunteers do?**

One volunteer who is highly trained in photo analysis appraises the

museum's photography, recommending items for discard or preservation.

He recently completed a project matching approximately six hundred unmounted, unorganized photographs of landscapes and animals in Alaska to their counterparts in a set of albums, identifying those that had no duplicate and those that weren't part of the series. He is now reviewing photographs taken by our Education Department staff of special events and recommending which should be preserved in the archives and which should be discarded.

The other volunteer helps with processing by rehousing papers into folders and photographs into sleeves and boxes. He also researches reference inquiries that can be answered by collections with which he's familiar and does some preliminary weeding of museum records, identifying duplicates and routine requests that may be discarded. He has also created an index to the museum's publicity scrapbooks.

### **What kind of initial training do volunteers receive?**

I do a lot of individual training, giving them basic principles of archives and records handling guidelines, along with training specific to their projects. In planning their projects, I think through the complete process they'll go through, including what they will physically do and what decisions they'll have to make and the criteria for them.

### **What kinds of ongoing training or written instructions do you provide?**

I'll write a step-by-step plan for the project, review it with the volunteers, and answer questions before they start the project. I'll check in to see how it's going and ask them to let me know if they have any questions. Most of the training is specific to their project, but I try to give them as much information as they would like about archives practices in general. When there have been several volunteers with an interest, I've done a very brief program with them to review basic principles and practices.

### **How do you supervise volunteers' day-to-day work?**

Once we're both comfortable with what the volunteers are doing, I mainly check in at the beginning and end of the morning, and I review the work once it's completed.

### **How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?**

I keep up to date on the status of the project by checking on it each day the volunteers work, and I ask them to keep notes of their progress.

### **If the volunteers work with original material, how do they access this archival material?**

Volunteers do not have direct access to the storage areas, so they go through me to get the material they need. Call slips are filled out for material moved to carts for repeated use, which are kept locked in my office or the storage area when not in use.

### **How do you handle security issues?**

Our volunteers do not usually go through a security check before being "hired," but references are checked. They sign in every day they work on the archives registration log. They work at the reading room table, which is within sight of me and each other.

### **How do you thank the volunteers?**

The museum has an annual volunteer dinner where all volunteers are officially thanked; they receive a museum membership and free passes (depending on the number of hours worked), and the volunteer coordinator meets with them occasionally and plans programs for them. Because the archives volunteers are in the Curatorial Department, curators give them an advance preview of new exhibits before they open for the season. I thank them when they leave every day and let them know when their projects are making life easier for researchers.

### **How do you decide if the project is a success?**

It's a success if it improves access to our collections or helps preserve them for future access.

# Smithsonian Institution Archives

<http://siarchives.si.edu/>  
Washington, D.C.

*Project Title*

## Electronic Records Projects: Born-Digital Video

*Contact*

**Tammy Peters, Supervisory Archivist**

peterst@si.edu

(202) 633-5926

## Institutional Information

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The Smithsonian Institution Archives (SIA) captures, preserves, and makes available to the public the history of this extraordinary institution. From its inception in 1846 to the present, the historical records of the institution—its people, programs, research, and stories—have been gathered, organized, and disseminated so that everyone can learn about the Smithsonian. The history of the Smithsonian is a vital part of American history, of scientific exploration, and of international cultural understanding. We have twenty-six staff members.

Internally, the archives staff helps to manage records that are created throughout the institution, and they identify those materials that have long-term value for research and for institutional accountability. Preservation

and conservation experts ensure that archival records are maintained and cared for using state-of-the-art standards and practices. Historians and reference specialists provide expert service to researchers and the general public. Increasingly, our digital archivists and web specialists are making the archives more accessible by taking advantage of current technologies.

The Archives' Mission: The Smithsonian Institution Archives serves as the institutional memory of a unique cultural organization. The archives' mission is to document the goals and activities of the whole Smithsonian in its pursuit of increasing and diffusing knowledge, and exciting learning in everyone. The archives is also responsible for ensuring institutional accountability and for enhancing access to the rich and diverse

resources in its care. The mission is carried forward by:

- Appraising, acquiring, and preserving the records of the institution and related documentary materials.
- Offering a range of research and reference services to the public.
- Establishing policy and providing expert guidance on record-keeping practices.
- Creating and promoting products and services that broaden understanding of the history and culture of the Smithsonian.
- Providing professional archival and conservation expertise across the institution and to the public.

Programs include: Archives, Collections Care, Digital Services, and Institutional History.

## Project Details

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**Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

Volunteers exist in our archives division, preservation team, and history division. Anyone on my staff at the assistant archivist level can supervise. Basically, if someone is willing (and it won't interfere with their own work), they can supervise.

**How many volunteers work on the project?**

We have a variety of projects each year. There may be five to ten volunteers working on three to five unique types of projects.

**If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day;**

**does each volunteer work on an independent piece of the project?**

Usually volunteers have "ownership" of their own projects; for example, each volunteer will be assigned to a collection.

**How do you recruit the volunteers?**

The Smithsonian has a central volunteer office, and we submit projects to them for advertising. Our opportunities for volunteers are posted on the website <http://www.si.edu/Volunteer>. Volunteers also hear about us through word of mouth.

**Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

For this project, experience with digital records is preferred.

**How many hours per week does each volunteer contribute to the project?**

It varies. Most come in one day per week.

**Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

Volunteers may work any time between 9:00 a.m. and 5:00 p.m.

**Where does the work take place?**

All volunteers for this project work at our main office facility.

**What kinds of equipment does the project require?**

This project requires computers with appropriate software and scanning equipment.

**What kinds of tasks do the volunteers do?**

The volunteer focuses on born-digital video within SIA's collections. The

project will include researching tools and formats, reviewing previous work done at SIA, and extending this to the next level. Other work will include digital preservation of other formats by processing at least one accession from ingest to complete preservation.

**What kind of initial training do you provide the volunteers?**

We ensure that volunteers have basic preservation and handling training.

**What kinds of ongoing training or written instructions do you provide?**

Usually ongoing training consists of face-to-face conversations and feedback. Supervisors always have an open-door policy for questions (which are encouraged).

**How do you supervise volunteers' day-to-day work?**

See above.

**How do you manage the project? For example, how do you track and report the project's progress and how do you ensure quality control?**

We usually conduct weekly check-ins and spot-checking for quality assurance.

**If the volunteers work with original material, how do they access this archival material?**

Materials are paged from collections storage for the volunteers. They do not have access to the stacks.

**How do you handle security issues?**

We have key-card access to public and collections areas. All volunteers are run through the Smithsonian security system, and they receive badges.

**How do you thank the volunteers?**

Mostly, we hold group lunches. We also provide frequent interaction and assistance.

**How do you decide if the project is a success?**

Completion according to our standards is a success.



# Smithsonian Institution Archives

<http://siarchives.si.edu/>  
Washington, D.C.

*Project Title*

## Preserving Primary Materials that Document the History of the Institution from the Nineteenth and Twentieth Centuries

(Materials include handwritten and typewritten documents, letters, and illustrations; architectural renderings and prints; photographic prints and negatives; motion picture film; and videotape and audiotape.)

*Contact*

**Tammy Peters, Supervisory Archivist**

peterst@si.edu  
(202) 633-5927

### Institutional Information

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The Smithsonian Institution Archives (SIA) captures, preserves, and makes available to the public the history of this extraordinary institution. From its inception in 1846 to the present, the historical records of the institution—its people, programs, research, and stories—have been gathered, organized, and disseminated so that everyone can learn about the Smithsonian. The history of the Smithsonian is a vital part of American history, of scientific exploration, and of international cultural understanding. We have twenty-six staff members.

Internally, the archives staff helps to manage records that are created throughout the institution, and they identify those materials that have long-term value for research and for institutional accountability. Preservation

and conservation experts ensure that archival records are maintained and cared for using state-of-the-art standards and practices. Historians and reference specialists provide expert service to researchers and the general public. Increasingly, our digital archivists and web specialists are making the archives more accessible by taking advantage of current technologies.

The Archives' Mission: The Smithsonian Institution Archives serves as the institutional memory of a unique cultural organization. The archives' mission is to document the goals and activities of the whole Smithsonian in its pursuit of increasing and diffusing knowledge and exciting learning in everyone. The archives is also responsible for ensuring institutional accountability, and for enhancing access to the rich and diverse

resources in its care. The mission is carried forward by:

- Appraising, acquiring, and preserving the records of the institution and related documentary materials.
- Offering a range of research and reference services to the public.
- Establishing policy and providing expert guidance on record-keeping practices.
- Creating and promoting products and services that broaden understanding of the history and culture of the Smithsonian.
- Providing professional archival and conservation expertise across the institution and to the public.

Programs include: Archives, Collections Care, Digital Services, and Institutional History.

### Project Details

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**Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

While volunteers exist in our Archives Division, this project resides with the Preservation Team and History Division.

Anyone on my staff at the assistant archivist level can supervise. Basically, if someone is willing (and it won't interfere with their own work), they can supervise.

**How many volunteers work on the project?**

We have a variety of projects each year.

There may be five to ten volunteers working on three to five unique types of projects.

**If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day;**

**does each volunteer work on an independent piece of the project?**

Usually volunteers have “ownership” of their projects; for example for a re-housing project, each volunteer will be assigned to a collection.

**How do you recruit the volunteers?**

The Smithsonian has a central volunteer office, and we submit projects to them for advertising. Our opportunities for volunteers are posted on the website <http://www.si.edu/Volunteer>. Volunteers also hear about us through word of mouth.

**Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

For this project, knowledge about materials found in archives and libraries and their deterioration is helpful but not necessary. Excellent hand skills and sensitivity toward handling old, fragile materials is very important. Interest in archives, libraries, or history is preferred.

**How many hours per week does each volunteer contribute to the project?**

It varies. Most come in one day per week.

**Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

Volunteers may work any time between 9:00 a.m. and 5:00 p.m.

**Where does the work take place?**

For this project, volunteers are located at our main office facility.

**What kinds of equipment does the project require?**

Equipment requirements vary with projects.

**What kinds of tasks do the volunteers do?**

Volunteers perform hands-on preservation work and make decisions about types of housing materials to be used. Volunteers also perform basic archival functions, such as creating box lists, checking inventory lists, and generating location labels.

**What kind of initial training do you provide the volunteers?**

Volunteers receive basic preservation and records handling training. They are trained to prepare records for storage by re-housing the collections in appropriate boxes, folders, sleeves, and custom-made enclosures.

**What kinds of ongoing training or written instructions do you provide?**

Usually our training involves face-to-face conversations and feedback. Supervisors always have an open-door policy for questions, which are highly encouraged.

**How do you supervise volunteers' day-to-day work?**

See previous answers.

**How do you manage the project? For example, how do you track and report the project's progress and ensure quality control?**

Usually by conducting weekly check-ins and spot-checking for quality assurance.

**If the volunteers work with original material, how do they access this archival material?**

Materials are paged from collections storage for the volunteers. They do not have access to the stacks.

**How do you handle security issues?**

We have key-card access to public and collections areas. All volunteers are processed through the Smithsonian security system, and they receive badges.

**How do you thank the volunteers?**

Volunteers are thanked mostly with group lunches as well as through frequent interaction and assistance.

**How do you decide if the project is a success?**

Completion according to our standards is a success.

# State Historical Society of North Dakota, State Archives

<http://history.nd.gov/archives/index.html>

Bismarck, North Dakota

*Project Title*

## North Dakota County/District Court Case File Project

*Contact*

**Larissa Harrison**

lharrison@nd.gov

(701) 328-2663

### Institutional Information

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The State Archives Division is responsible for acquiring, preserving, and referencing the documentary holdings of the State Historical Society of North Dakota (SHSND). It is the depository for the records of enduring value produced by

state agencies and local government offices. The States Archives Division also acquires and preserves all types of research materials relating to North Dakota and the Northern Great Plains, including manuscript collections, books,

periodicals, maps, newspapers, audio and video materials, and photographs.

The State Archives Division has twelve full-time and two part-time employees as well as about fifteen volunteers.

### Project Details

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#### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

The project is located in the State Archives and is supervised by an archives specialist.

#### **How many volunteers work on the project?**

Five volunteers contribute to this project.

#### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

Each volunteer works on his or her own box if working at the same time as another volunteer; if working solo, each volunteer starts where the last person stopped for the day.

#### **How do you recruit the volunteers?**

Through the State Historical Society of North Dakota Volunteer Program.

#### **Do you have any restrictions on who may participate (minimum or maximum age, education, experience, other)?**

The volunteer must be able to work independently and be comfortable with computers.

#### **How many hours per week does each volunteer contribute to the project?**

Each volunteer spends two to six hours a week on the project.

#### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

The schedule is flexible, but volunteers usually chose one day per week to work.

#### **Where does the work take place?**

Volunteers work in the archives workroom.

#### **What kinds of equipment does the project require?**

A computer with Microsoft Access installed for data entry of case names is usually required.

#### **What kinds of tasks do the volunteers do?**

Tasks include data entry of case number, title, date, and box. Some foldering and reboxing may be required on a limited basis.

#### **What kind of initial training do you provide the volunteers?**

We familiarize the volunteers with Microsoft Access forms used by the archives for entry, and acquaint them with the information that needs to be entered on the forms and where that is found on the record.

**What kinds of ongoing training or written instructions do you provide?**

Written instructions are left if the archives specialist is away on a volunteer day. They include how to turn on the computer, the passwords, and how to enter Microsoft Access. If the volunteer is new, our standard practice is that while the archives specialist is away, the volunteer must take the day off.

**How do you supervise volunteers' day-to-day work?**

We give instructions, set up the computer for the day's work, and verify correct box and folder numbers.

**How do you manage the project? For example, how do you track and report the project's progress, and ensure quality control?**

The project is tracked by how many boxes are entered a month.

The archives specialist runs spell check periodically to correct minor spelling or keying mistakes. They also check for consistent entry of case name format.

Box and folder numbers are also verified to make sure case files are in the correct boxes.

**If the volunteers work with original material, how do they access this archival material?**

Boxes are brought down from the stacks, and the archives specialist is notified when more boxes are needed during their

workday. The archives specialist monitors their workflow and tries to bring down enough boxes for that day's work (usually three to six hours).

**How do you handle security issues?**

Volunteers follow State Historical Society of North Dakota policies and procedures, along with the Deputy State Archivist and Security staff.

**How do you thank the volunteers?**

Volunteers are thanked at an annual banquet.

**How do you decide if the project is a success?**

When all the case files are entered into the Access database and cases are being used by researchers.



# State Historical Society of North Dakota, State Archives

<http://history.nd.gov/archives/index.html>

Bismarck, North Dakota

*Project Title*

## Prairie Public Television: SPIN Program Digitization

*Contact*

**Shane Molander, Deputy State Archivist**

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(701) 328-3570

### Institutional Information

The State Archives Division is responsible for acquiring, preserving, and referencing the documentary holdings of the State Historical Society of North Dakota (SHSND). It is the depository for the records of enduring

value produced by state agencies and local government offices. The division also acquires and preserves all types of research materials relating to North Dakota and the Northern Great Plains, including manuscript collections, books,

periodicals, maps, newspapers, audio and video materials, and photographs.

The State Archives division has twelve full-time and two part-time employees as well as about fifteen volunteers.

### Project Details

#### **Where is the project located within your organizational structure and who (e.g., archivist, curator, volunteer coordinator, or other) oversees the project?**

This project was located in the Audio/Visual project room in the State Archives. Deputy State Archivist Shane Molander oversaw the project.

#### **How many volunteers work on the project?**

One volunteer was assigned to this project.

#### **If you have multiple volunteers working on the project, how do you organize them? For example, do you have a lead volunteer; do you organize work according to day; does each volunteer work on an independent piece of the project?**

Even though there was only one volunteer on this project, I did coordinate times because the digitization equipment is used for other projects.

#### **How do you recruit the volunteers?**

Volunteers usually hear about SHSND from current and former volunteers. They meet with the agency volunteer coordinator, Beth Campbell, and are usually given a tour so they can find out what there is to do and what may interest them.

#### **Do you have any restrictions on who may participate (minimum or maximum age, education, experience, or other)?**

No, we do not have restrictions.

#### **How many hours per week does each volunteer contribute to the project?**

The volunteer worked six to nine hours per week.

#### **Does the project require volunteers to have a specific schedule, or is the schedule flexible?**

The hours were somewhat flexible as long as I was aware of the time the volunteer would be here, so I could make sure the

project room was not being used for something else.

#### **Where does the work take place?**

This project was located in the AV Project Room in the State Archives.

#### **What kinds of equipment does the project require?**

This project required ¾-inch video transfer and digitization equipment and a computer that was accessible to the network in order to enter metadata of the material being digitized.

#### **What kinds of tasks do the volunteers do?**

1. Fluff the tape by putting it in a ¾-inch deck, forwarding the tape, and then rewinding. Inspect for any visible physical damage.
2. Turn on the transfer and digitizing equipment and put the tape in the ¾-inch deck. Open the software that records the tape and type in the title. Record the tape to the computer.

- As the tape is playing and being transferred, read the “shot sheet” to see if the names and events on the video program match.
- Enter the subject matter and description into the “Film All” Access database.

### What kind of initial training do you provide the volunteers?

I ran through every aspect of the process and wrote down the list of steps to be taken.

### What kinds of ongoing training or written instructions do you provide?

I visited with the volunteer weekly while the volunteer was here and communicated through email when I wasn't able to meet with the volunteer.

### How do you supervise volunteers' day-to-day work?

I checked the work to make sure everything was done correctly.

### How do you manage the project? For example, how do you track and report the project's progress, and how do you ensure quality control?

I checked the descriptions and also the quality of the video transfer regularly. We also discussed any issues or questions that may arise.

### If the volunteers work with original material, how do they access this archival material?

I brought the material (videotapes) to the volunteer from the storage area.

### How do you handle security issues?

The volunteer passed through security, as well as a check by the reference staff, to get in and out of the building.

### How do you thank the volunteers?

There are two big events during the year. One is the Valentine Social and the other is the Volunteer Awards Banquet, where the volunteers are invited to free food and entertainment. There are some smaller events that go on during the year, such as sites tours, where they may travel to various sites for a day.

### How do you decide if the project is a success?

If the work gets done right and does not need to be fixed, it is considered a great success.



SPIN videotapes were recently digitized from their ¾" format. Courtesy of the State Historical Society of North Dakota, State Archives.

The Prairie Public Television program SPIN aired from 1976–1981. Courtesy of the State Historical Society of North Dakota, State Archives.

SHSND Reference Specialist Sarah Walker checks a recently digitized episode of a program from more than thirty years ago. Courtesy of the State Historical Society of North Dakota, State Archives.

# **Tools Shared by Archives**

# Indiana Historical Society

## Volunteer Questionnaire



**VOLUNTEER SERVICES**

# Volunteer Questionnaire

*rev. 1/10:MS*

**INDIANA HISTORICAL SOCIETY**

**Personal:**

*Please print or type.*

Name:

Address:

City:

Employer:

Days/Hours:

E-mail:

**Date:**

Home Phone:

State:                  Zip:

Work Phone:

Position:

Fax:

Are you under 18 years of age?  Yes  No

Have you ever been convicted of a crime more serious than a minor traffic violation?  Yes  No  
 (A criminal record does not constitute an automatic bar to being accepted as a volunteer.)

If yes, please specify date, charge, place, and action taken:

Person to contact in case of emergency:

Name:

Home Phone:

Relationship:

Work Phone:

**Education:**

High School                   Attending College                   College Graduate                   Technical / Trade School

Degree(s)/Certification:

I am now studying at:

Subject/Major:     Full Time                   Part Time

Number of hours enrolled:

<p><i>Return questionnaire to:</i>                  Coordinator, Volunteer Services                  Indiana Historical Society                  Eugene and Marilyn Glick Indiana History Center                  450 West Ohio Street                  Indianapolis, Indiana 46202-3269</p>	<p><i>Questions:</i>                  Call (317)234-7640                  E-mail: <a href="mailto:volunteers@indianahistory.org">volunteers@indianahistory.org</a></p>
--	--



Why do you wish to volunteer at the Indiana Historical Society?

How did you hear about volunteer work at the Society?

Do you have previous historical society/museum experience?  Yes  No

If yes, where have you worked and in what capacity?

**Previous Volunteer Experience:**

*(Please complete in full, starting with your most recent volunteer experience.)*

Organization Name	Dates of Service	Volunteer Duties	Supervisor Name and Phone #

**Availability:**

Which days would you like to work? *(Please circle.)*

M T W TH F SAT SUN

What time of day would you prefer? *(Please circle.)*

Mornings Afternoons Evenings

What type of projects do you prefer? *(Check all that apply.)*

- Long term projects, ie: several weeks
- Short term projects, ie: a few hours
- Ongoing projects, ie: 2-4 hours weekly/monthly
- One time project, ie: special event

Type(s) of volunteer opportunities interested in: *(Check all that apply.)*

- Indiana Experience
- Clerical Support
- Special Events
- Conservation Lab Assistant
- History Market
- Other:
- Library Projects

Are there kinds of projects you would like to avoid?  Yes  No

If yes, please list:

List any experience and/or special skills that you can bring to us!

**References:**

*Please list two business, school, or volunteer work references (not relatives) who we may contact regarding your application.*

Name	Title	Address	Phone	Relationship

I certify that the statements made in this volunteer application are true and correct, have been given voluntarily, and understand that misrepresentation is just cause for dismissal. I understand that a background investigation check may be made whereby information may be obtained through personal interviews, a police-criminal records check, and other sources that have information about me. I hereby grant permission and consent to any such verification and investigation, agree to cooperate in same, and release from all liability or responsibility all persons, organizations, companies, and corporations collecting and supplying information.

My services are donated to IHS without contemplation of compensation or future employment and given with charitable reasons. I understand that failure to follow IHS policies and procedures may be grounds for dismissal.

Applicant's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Opportunities for volunteers are provided without regard to religion, creed, race, national origin, age, gender, or disability.

# National Archives and Records Administration

## Volunteer Service Application



## VOLUNTEER SERVICE APPLICATION

### INSTRUCTION SHEET

Thank you for your interest in becoming a volunteer at the \_\_\_\_\_. Our volunteers play a vital role in the activities at the \_\_\_\_\_. They supplement the staff in important ways with special talents and knowledge that might not be otherwise available.

Please note that you must meet the following requirements in order to be qualified as a NARA volunteer: you must be 16 years or older and meet one of the following three requirements: (1) you must be a U.S. citizen; (2) you must be a legal resident alien [possessor of a green card]; or (3) you must be a holder of a type A1 or A2 diplomatic visa. If you do not meet these requirements, we will not be able to accept your volunteer application.

The next step in applying to become a volunteer is to complete the attached form. Your answers to the questions will enable us to see where you might best help our program and what activities would be most fulfilling to you. Many of the questions are self-explanatory. Others might need a little explanation.

Please note that a background check will be necessary, depending on the type of volunteer service you will provide and the kind of access you are provided to our facility. For further information about this step in the application process, please contact \_\_\_\_\_.

Please read the Paperwork Reduction Act Burden Statement and the Privacy Act Statement that follow. The Privacy Act Statement explains the circumstances under which this information may be shared with someone other than NARA staff. Be assured that any information you provide will be held in the strictest confidence and divulged to others only in compliance with the Privacy Act and the Freedom of Information Act.

#### PAPERWORK REDUCTION ACT PUBLIC BURDEN STATEMENT

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Public burden reporting for this collection of information is estimated to be 25 minutes per response. Send comments regarding the burden estimate or any other aspect of the collection of information, including suggestions for reducing this burden, to National Archives and Records Administration (NHP), 8601 Adelphi Road, College Park, Maryland 20740. **DO NOT SEND COMPLETED VOLUNTEER APPLICATION FORMS TO THIS ADDRESS. SEND COMPLETED FORMS TO THE ADDRESS INDICATED ON THE LAST PAGE OF THIS FORM.**

#### PRIVACY ACT STATEMENT

Collection of this information is authorized by 44 U.S.C. 2104 and 44 U.S.C. 2105(d). The information you provide to NARA on this form will be used to determine if you will be accepted as a volunteer. This information may be disclosed to an expert, consultant, agent or contractor of NARA to the extent necessary for them to assist NARA in the performance of its duties or in accordance with any other "routine uses of records" listing in the Privacy Act System of Records NARA 26, "Volunteer Files." Completing this form is voluntary, but failure to provide all of the requested information will result in you not being accepted as a volunteer.



## VOLUNTEER SERVICE APPLICATION

Please check if you have  U.S. Citizenship  a green card  an A1 or A2 diplomatic visa

<b>PERSONAL INFORMATION</b>				
Please provide a phone number at which we may reach you Monday through Friday, between [facility's business hours] to follow up on your application. You also may provide an e-mail address for that purpose.				
Name: <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms			Date of Birth (MM / DD / YYYY)	
Street Address, City, State, ZIP				
Preferred Telephone Number		Preferred E-mail Address		
<b>EDUCATION</b>				
Level	Name and Location of Institution	Years Attended (start – end)	Diploma / GED	
High School		--	Please check: <input type="checkbox"/> Yes <input type="checkbox"/> No	
College:	Name of Institution	Years Attended	Major Field of Study	Degree
Undergraduate		--		
Undergraduate		--		
Graduate		--		
<b>WORK EXPERIENCE</b>				
<b>(Summarize your last 10 years of employment)</b>				
When listing your work experience, show only the last 10 years of employment. If you are retired, describe the last 10 years you worked before you retired.				
Position		From -- To	Employer	
		/   -   /		
		/   -   /		
		/   -   /		
		/   -   /		
<b>PREVIOUS VOLUNTEER EXPERIENCE</b>				
Duties		From -- To	Organization	
		/   -   /		
		/   -   /		



	/ - /	
	/ - /	

**LANGUAGES**

An ability to speak and understand a foreign language most likely will be used to greet and possibly guide foreign visitors. You would not be expected to explain highly technical aspects of the [facility or program name] program. Reading and translating duties might involve assisting the staff in reading and responding to foreign language correspondence or in translating documents from the holdings of the [facility or program name].

Foreign Language(s) [Please list]	Speak and Understand		Can Read and Translate into and from	
	Fluent	Proficient	Easily	Passably
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Special Languages:

American Sign Language	<input type="checkbox"/> Highly Skilled	<input type="checkbox"/> Some Ability	
Braille		<input type="checkbox"/> Highly Skilled	<input type="checkbox"/> Some Ability

**SPECIAL SKILLS**

(Check all that apply. H = Highly Skilled S = Some Experience)

The information you provide will help us to identify which activities at the [facility or program name] will most interest you and where you can make the greatest contribution to our program. Please mark those activities on the list with which you have experience and indicate your level of expertise. Please add any other activities in which you have experience that you think will fit into the [facility or program name]'s program.

General			Computer		
Skill Level:	H	S	Skill Level:	H	S
Research: General	<input type="checkbox"/>	<input type="checkbox"/>	Databases	<input type="checkbox"/>	<input type="checkbox"/>
Genealogical	<input type="checkbox"/>	<input type="checkbox"/>	Microsoft Word	<input type="checkbox"/>	<input type="checkbox"/>
U.S. History:	<input type="checkbox"/>	<input type="checkbox"/>	Other Word Processing	<input type="checkbox"/>	<input type="checkbox"/>
Era of Interest:			HTML	<input type="checkbox"/>	<input type="checkbox"/>
Special Events: Planning / Staging	<input type="checkbox"/>	<input type="checkbox"/>	Excel	<input type="checkbox"/>	<input type="checkbox"/>
Librarianship	<input type="checkbox"/>	<input type="checkbox"/>	PowerPoint	<input type="checkbox"/>	<input type="checkbox"/>
Archives	<input type="checkbox"/>	<input type="checkbox"/>			
Teaching	<input type="checkbox"/>	<input type="checkbox"/>			
Writing / Editing	<input type="checkbox"/>	<input type="checkbox"/>			
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>			
Public Outreach	<input type="checkbox"/>	<input type="checkbox"/>			

**WHEN AVAILABLE**

Days:	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Wednesday	<input type="checkbox"/> Thursday	<input type="checkbox"/> Friday	<input type="checkbox"/> Saturday	<input type="checkbox"/> Sunday
Hours:							

**REFERENCES**

(List two people who are not relatives who know about your abilities and knowledge)

It is important that you provide the names of two individuals who can be contacted to discuss your qualifications for a volunteer position. They will be informed of the reason for the contact.

Name	Name
Street Address	Street Address
City, State, ZIP	City, State, ZIP
Telephone	Telephone

<b>Signature</b>	<b>Today's Date</b>	
<b>SEND YOUR COMPLETED APPLICATION:</b>		
<b>By Postal Mail to:</b>	<b>By FAX to:</b>	<b>By e-mail to:</b>
For questions about completing this form, please contact our Volunteer Coordinator at .		

# National Archives and Records Administration

## Volunteer/Intern Emergency and Medical Consent Form



### VOLUNTEER / INTERN EMERGENCY AND MEDICAL CONSENT

#### National Archives and Records Administration

This form is kept on file in your volunteer or intern personnel record. The information is essential for the National Archives to contact the persons you designate in case of an emergency and to arrange to transport you to the nearest medical facility as warranted.

**EMERGENCY CONTACT INFORMATION:** Please list two individuals whom we can contact in case of a medical or other emergency.

Name		
Street Address		
City	State	ZIP
Home Phone	Work Phone	Cell phone

Name		
Street Address		
City	State	ZIP
Home Phone	Work Phone	Cell phone

**EMERGENCY TREATMENT:** In emergencies requiring immediate medical attention, you will be taken to the nearest hospital emergency room. Your signature authorizes the National Archives to have you transported to that hospital.

\_\_\_\_\_  
Volunteer/Intern Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

<p><b>PAPERWORK REDUCTION ACT PUBLIC BURDEN STATEMENT</b></p> <p>You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Public burden reporting for this collection of information is estimated to be 6 minutes per response. Send comments regarding the burden estimate or any other aspect of the collection of information, including suggestions for reducing this burden, to National Archives and Records Administration (NHP), 8601 Adelphi Road, College Park, Maryland 20740.</p> <p style="text-align: center;"><b>PRIVACY ACT STATEMENT</b></p> <p>In compliance with the Privacy Act of 1974, the following information is provided: Solicitation of the information is authorized by 44 U.S.C. 2104. The information provided will be used to contact the referenced individuals in case of an emergency and to facilitate emergency treatment on your behalf. Furnishing this information is voluntary; however, failure to do so may prevent or delay us from taking immediate action in the event of a medical emergency.</p>
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# National Archives and Records Administration

## Standards of Conduct for Volunteers



### National Archives and Records Administration

#### Standards of Conduct for Volunteers

The National Archives and Records Administration (NARA) recruits as volunteers individuals who have an interest in American history, archives, genealogy, or the National Archives itself and its regional programs, educational programs, and special events. Volunteers donate their time and talents serving the agency, functioning in an important public relations capacity by promoting the goals and objectives of the National Archives to the public and by providing a variety of services on behalf of the National Archives in a variety of settings. Volunteers also may assist the NARA staff in performing reference or other archival project services.

Since the primary objective of the NARA Volunteer Program is to assist the National Archives and those using its services, the Standards of Conduct listed here have been developed to define the responsibilities and obligations that go with this volunteer service.

Serving as a NARA volunteer is an honor that is conditioned upon observance of the following Standards of Conduct. NARA reserves the right to terminate the service of a volunteer if we determine that the volunteer has not complied with any of these standards.

1. NARA volunteers must always act in a courteous, considerate, and prompt manner in dealing with the public, fellow volunteers, and National Archives staff. NARA volunteers must avoid any action, whether or not specifically mentioned in these Standards of Conduct, which might result in or create the appearance of:

- a. Using their NARA volunteer position for the private gain of themselves or others;
- b. Giving preferential treatment to any one NARA user over another;
- c. Impeding Government or NARA efficiency or economy;
- d. Losing independence or impartiality;
- e. Affecting adversely the confidence of the public in the integrity of the Government or of NARA.

2. NARA volunteers may not engage in activities or otherwise mislead anyone to identify NARA with the products or services of a private association, organization, or business.

3. NARA volunteers may not use, directly or indirectly, inside or other nonpublic information, whether or not use of such information is intended to further a private gain (financial or otherwise) for themselves or others, if such information is not generally available to the public or if such information was obtained solely by reason of their NARA volunteer service.



4. NARA volunteers who are members of a private group, association, or organization must avoid activities on behalf of the group, association, or organization that are incompatible with their NARA volunteer positions or which otherwise might imply endorsement of the group, association, or organization by NARA or the Government.

5. NARA volunteers must endeavor to promote equal access to NARA records and services to the fullest extent consistent with the public interest. Volunteers must avoid any appearance of preferential treatment or service that would give an individual user unfair influence or advantage over other users of NARA services.

6. NARA volunteers must preserve the security and integrity of Federal property, including archival and donated historical materials in the custody of the National Archives and the Presidential libraries. They must observe all NARA regulations and procedures for storing, handling, and disclosing information from these records and materials.

7. NARA volunteers may not solicit NARA-related research business in a NARA facility while serving as a NARA volunteer. Volunteers may post their business cards on specified bulletin boards. Volunteers may not include their volunteer status at NARA on any business card.

8. NARA volunteers may not personally seek or accept money or any other thing of value (including gifts of any kind) in connection with their NARA service, except in those instances when they are acting on behalf of an officially recognized NARA support organization.

9. NARA volunteers must not use, take, dispose of, or allow others to use, take, or dispose of Government records, property, facilities, or services of any kind for other than officially approved Government business. Government facilities, telephones, property, and staff may be used only for official NARA business and only when authorized by appropriate NARA officials.

10. NARA volunteers may publish and distribute the products of their volunteer service, such as indices or descriptive lists obtained or created in the course of the volunteers' duties for NARA, only after NARA has released the products or the information they contain to the public. In addition, NARA volunteers may not claim copyright in the products, because the products are NARA property (i.e., "works of the United States") and are not eligible for copyright protection.

11. The rules in paragraphs 1 – 10 above apply when a NARA volunteer is performing volunteer services for another Government entity as a NARA volunteer.

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Signature of Volunteer

---

Date

# National Archives and Records Administration

## Volunteer Project Worksheet

Project # \_\_\_\_\_

(Assigned by Volunteer Office)

Volunteer Project Worksheet – Archives II	
Date: <i>(mm/dd/yyyy)</i>	
Project title:	
<b>REQUESTING OFFICE &amp; CONTACT NAME:</b>	
Requesting office:	<a href="#">Click to Select Office</a>
Contact name:	
E-mail & telephone:	
<b>PROJECT DESCRIPTION</b> <i>(Describe what work is to be done):</i>	
<b>PROJECT DETAILS:</b>	
Location where work will be done:	
Length of commitment: <i>(days/months/years)</i>	
Estimated total hours – per week:	
Does the project require volunteers to have a specific schedule or can the schedule be flexible?	
Estimate of volume of materials to be processed:	
Number of volunteers requested:	
Special or unique requirements:	
<b>PROJECT TASK(S) TO BE ACCOMPLISHED:</b>	

**Project #** \_\_\_\_\_

*(Assigned by Volunteer Office)*

<b>RESOURCES</b> <i>(List resources required and their sources):</i>	
<b>TRAINING</b> <i>(Specific training required and name of trainer):</i>	
<b>VOLUNTEERS ASSIGNED</b> <i>(To be completed by the Volunteer Office):</i>	
<b>OTHER UNITS AFFECTED BY THE PROJECT</b> <i>(Have you alerted the units - Yes or No):</i>	
<b>ADDITIONAL NOTES &amp; COMMENTS:</b>	

# Oregon Jewish Museum

## Archival Processing Manual

### Chapter 1: Introduction

The Manuscript Collection at the Archives of the Oregon Jewish Museum began in 1995 with the accession of 100 linear feet of materials that had been collected by the Jewish Historical Society of Oregon. Processing of the collection began in 1998 when OJM moved to its first physical location (prior to 1998, the items were stored in a closet at the Oregon Historical Society and were unavailable for processing). Artificial collections were created based on the subject matter of the documents, as no accession records were available for the materials (which were collected in the early 1970s by the members of the JHSO).

This manual, it is hoped, will bring consistent processing practices to the Archive for the first time. It will also serve as a training tool and reference source for the volunteers and interns who have great responsibilities in arranging and describing collections.

OJM will try to process its collection by the following guidelines:

1. The ideal level of processing is not the same for every collection. It is the processor's responsibility to determine the most practical processing scheme, whether this means an over-all description of the collection or a detailed description of the contents of each folder.
2. The research value of each collection should determine its level of processing.
3. Because of our limited resources, processors should do only enough work on collections to make them usable for researchers.
4. The archival principles of **provenance** and **original order** should determine arrangement.
5. The overall goals in processing are to preserve the material with enduring value in the collection, arrange the collection in a logical way, describe the arrangement in a well-written finding aid.

OJM is committed to providing effective access to all of its holdings and actively encourages its collections be used. In order to provide the best possible service to users, it is important that as many of our collections as possible be processed, open, and available for research. Processors must always keep in mind that they should not do more work on a collection than is necessary to make it usable because the extra work done on one collection will detract from the work that can be done on others.

Large portions of this text are taken from the processing manual of the University of Texas at Arlington Library



## What is “archival”?

Many items are brought into the collection at the Oregon Jewish Museum. The collection is comprised of three main areas each is organized and processed differently:

1. artifact collection
2. archival holdings
3. library

While it is easy to see that a candlestick belongs in the artifact collection, it is not always so apparent that a diary or scrapbook does not. It is the job of the curator to determine dispersal of each item as it enters the museum. This manual will cover procedures for handling and arranging documents once they have been included in the archival holdings.

Archival holdings include items that carry information that were used by an individual or organization and donated to the museum for preservation. These may include:

- 1 Photographs – prints, negatives, slides
- 2 Manuscripts – these include hand-written and typed documents, bound and unbound which are not published.
- 3 Ephemera – transitory documents such as invitations, programs, posters, tickets, etc. that were intended to be thrown away after being used
- 4 Published materials – books, newspapers, maps, and periodicals (these are in our library collection and cross-referenced to the Collection from which they came)
- 5 Recorded media – audio and video tapes, films
- 6 Digital materials

## The Research File

We make a distinction, when processing an item, based on the history we know about it. A newspaper clipping collected (“used”) by an individual who later donated that clipping to the museum becomes part of the archival collection of that individual (or organization). A newspaper clipping that was clipped by someone doing research on a subject or person becomes part of our “Research File.” The Research File, while part of the archival holdings, is not cataloged and is not of the same historic value. It is a vertical filing cabinet filled with obituary notices, family histories, clippings and other pieces of information which are not part of an archival collection.

You will not be removing items from an archival collection to the Research File unless there are duplicate newspaper clippings or ephemera that would otherwise be discarded. Consult the curator with questions regarding removing items from the collection.

## Chapter 2: Basic Principles of Processing

Processing an archival collection involves “taking it apart” and “putting it back together again”. In order to understand the way in which the items in a collection were used by their collector (archivists call this person the “creator” of the collection), an archivist must have a complete picture of the collection as a whole and an understanding of how each part fits into it. Archivists over the years have formulated a few basic principles to help guide them in their work of arranging and describing collections. These principles are provenance, the sanctity of original order, and the concept of levels of control. There have been a number of attempts to arrange archives in other ways, but these attempts have ended in failure and disruption of collections.

**Provenance.** Simply defined, provenance means that the archives of a given records creator must not be intermingled with those of other records creators. Archivist Fredric Miller has said that "provenance is the fundamental principle of modern archival practice." It is important to understand that provenance is identified primarily with the creator rather than the donor, if the two are different. For example, if Jane Smith donated the papers of her grandmother, Sarah Norton, the papers would be the Sarah Norton Papers because she created them.

**Original Order.** This principle states that records should be maintained in the order in which they were originally kept while in active use. It is not the order imposed on the material by someone who was not involved with the records while they were in active use. If the order has been destroyed over time or in the transfer/packing process, then it is the archivist's obligation to reconstitute it if possible. If the original order of a collection cannot be discerned or if the original order was capricious and incomprehensible, then the archivist must impose a reasonable and logical order on the collection.

**Levels of Control.** The concept of levels of control is not a theoretical principle, but rather a way of implementing provenance and original order in the management and processing of records. The work is generally done by grouping like items together, going from the largest and most general to the smallest and most specific. Not all collections need to be arranged and described at the same level. The collection's size, research value, basic structure, and other factors will dictate the level to which it should be arranged and described. The various levels of control are:

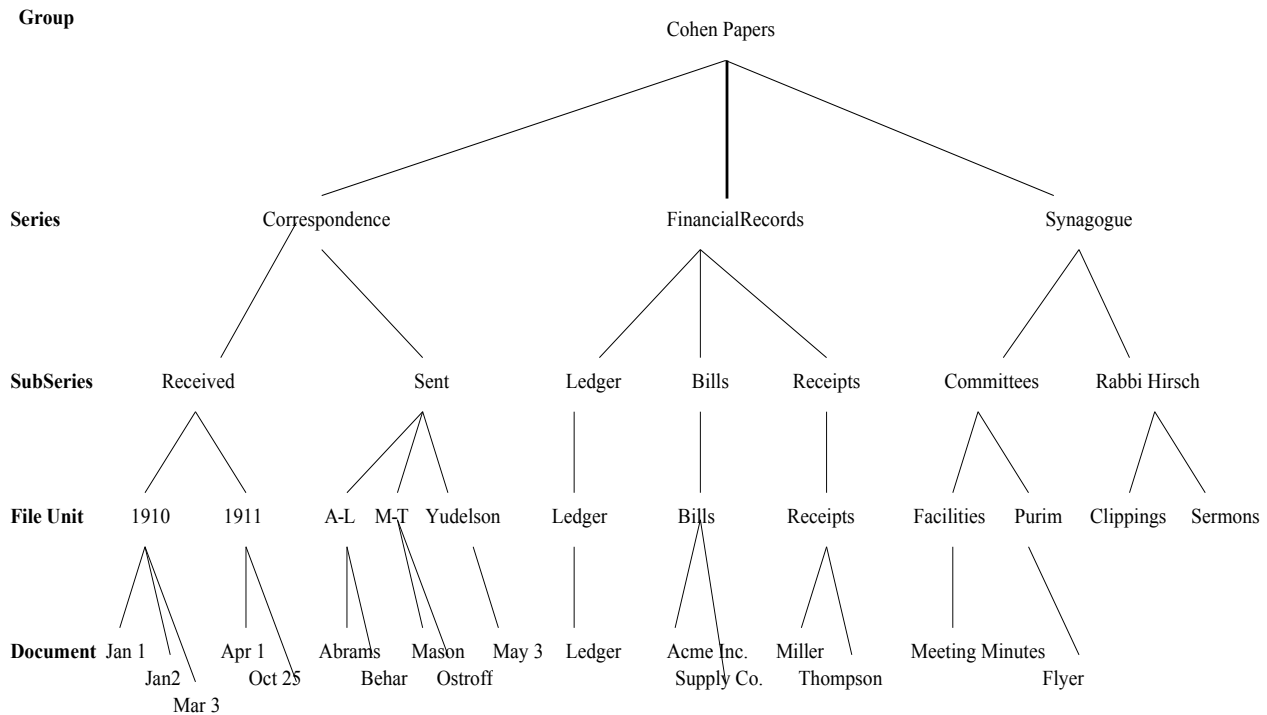
a. *Collection Level:* Generally, small collections, more than large ones, lend themselves to a single arrangement and only a collection-level description. Single items maintained as discrete collections, such as a diary, ledger book, scrapbook, etc., also should be described at only the collection level.

b. *Series Level:* A series is a broad category within a collection. It may represent the type of material (such as Correspondence, Minutes, or Financial Records) or it may represent a topic (such as Locations, People, Agriculture, Business). A series may be arranged alphabetically, chronologically, numerically, topically, or in some combination of these. For collections with no apparent order or discernable former order, the archivist may create series. In any case, **the series level is probably the most important one in arrangement** because here the archivist expresses the character of the collection by the series into which it has been divided.

For the most part, processing depends on discovering the series that the records were used in or establishing new series. The series cannot be isolated before the archivist has studied the entire collection. After the series have been established in a collection, the archivist then arranges the series by placing the most important one first, followed by the other series in descending order of importance. A series may also be divided into subseries based on form, record type, physical class of the records, or filing arrangement.

*c. Item Level:* An item is a single document or manuscript within a collection. The smaller, or more important, or more disheveled the collection, the more likely is the archivist to work it item by item. Single items are placed together in file units. Generally, items in files have either a chronological or alphabetical arrangement. For example, if one has a series of correspondence, arranged alphabetically in file units by the name of the individual to whom the correspondence is addressed, then the letters in each file unit would probably be arranged in chronological order. While archivists sometimes have to handle and arrange every item in a collection, it is extremely rare that they describe a collection at the item level, unless the collection is very small or very important. Time constraints restrict the description of a collection at such a minute level.

The levels of control deal with the arranging, ordering, and describing of a collection. According to T. R. Schellenberg, archival processing "is largely a process of grouping individual documents into meaningful units and of grouping such units in a meaningful relation to one another



## Chapter 3: Arrangement

Arrangement is the process of organizing archival and manuscript material in accordance with accepted archival principles. The two basic principles are provenance and original order.

**Provenance** means that records from one creator or one donor cannot be intermingled with records from another creator or donor even if the subject matter is the same. The principle of **original order** requires that materials in a collection be kept as the people who used them kept them whenever possible. The order of the records reveals information about the creator of the collection and how the documents were used and about the relationships between the files themselves. Items are re-ordered when keeping them in their original order would endanger them physically or make them unusable to researchers.

Arrangement of a collection consists of the following steps: research on the collection, survey of records pertaining to the collection, formulation of a processing plan, physical arrangement, processing and rehousing of materials, and labeling of file folders and boxes.

### A. Research

Before work can begin on processing a collection, it is helpful to know as much as possible about the subject of that collection. If the collection consists of personal papers, try to obtain a biography of that person, find out the dates of important events in that person's life, or determine noteworthy activities the person was engaged in. If the collection consists of the records of an organization, obtaining information may be more difficult. Check the holdings of the archive for a history of the organization or for oral history interviews with members of the organization. If these sources are not available either for an individual or for an organization--which is frequently the case--information will have to be obtained from the collection itself. The types of documents that are particularly useful for this purpose are resumes, obituaries, newspaper clippings, diaries, correspondence, annual reports, minutes, and charters.

### B. Survey

It is very important to examine all records pertaining to a collection before processing begins. Correspondence in the accession file should be read to learn whether there are special instructions from the donor with regard to disposal of material in the collection (such as duplicates) or other matters. The museum catalog should also be consulted to find out whether other processed or unprocessed material has been received from the same donor or creator.

After this basic information has been obtained, the collection should be assigned the title. Ordinarily collections are named for the person or organization that created the records, not for the donor. (The curator will probably have assigned the collection name prior to cataloging.) The type of collection is determined usually by the creator. For example, if the material was created by a person, the collection is titled "papers." If the material was created by an organization, the collection title is "records." If the material was artificially formed around a particular subject, person, or by a collector, the collection is titled "collection." If the entire collection is made up of only one document type, it can be titled more specifically, for example, "photographs," "minutes," and so forth.



## C. Processing Plan

With the preliminary work completed, you are ready to devise a processing plan. The first task is to obtain an overview of the collection. This is best done by setting the boxes on a table, opening each box, and quickly examining the contents of each box. If a careful box-by-box contents list was prepared at the time the collection was accessioned, an intellectual grasp of the contents can be obtained by reviewing the list. Scanning the actual contents of a collection, however, accomplishes several purposes. It helps the archivist to become more familiar with the collection and to note either mentally or on paper the logical sequence of the records and eventually to work out a plan for arranging the material. It also provides the archivist with many clues as to the task that lies ahead: Are file folders neatly arranged, are they poorly arranged, or are there no file folders? Do the folders have labels? Do folder titles actually reflect the contents? Are the papers in the folders in order? Are they folded? Are there few or many newspaper clippings, reels of film, photographs or fragile documents or artifacts that will require special attention? Is there any evidence of mildew, insect or rodent damage? Are there oversize documents, government documents, books, or other materials in the collection that may have to be handled separately or stored separately from the rest of the collection?

## D. Physical Arrangement

The primary task of the processor is to discover the creator's file order and to insure that it is systematically implemented. It bears repeating that a basic rule of archival management is that ideally the original order of the materials in a collection should not be altered or should be altered as little as possible. All too frequently, however, collections do not arrive in good order or sometimes have no order whatsoever. In these instances, the archivist has to impose order on the materials so that they will be easily accessible to the researcher.

There are four basic methods of arranging archival and manuscript collections:

- 1 - alphabetically by topic,
- 2 - in series by document type,
- 3 - chronologically,
- 4 - in series by function of the creator.

The arrangement of a collection will be determined largely by the size and content of the collection. For example, the file folders in a small collection might be arranged alphabetically by subject. If a collection contains only one or two types of material, it might be preferable to arrange the collection into document types, such as correspondence, minutes, and financial records kept chronologically. Some collections, such as the papers of rabbis or organizational leaders, lend themselves to chronological arrangement because the activities of the creator of the records are centered around specific time periods (i.e. terms in office). Very large collections also can be made more manageable if the records are arranged in series, which in turn are arranged chronologically, alphabetically, or by order of importance. Arrangement of records by function of the creator groups together documents that relate to a specific activity of the creator.

Larger collections are made more manageable by dividing the materials into series. For example, the papers of an individual might require a separate series for personal records, business records, and political records. The records of an organization might be divided into the different

components of that organization, such as Camps, Educational Programs, Theatrical Performances. If one document type dominates the collection, the series could be formed around that type, such as correspondence, financial records, minutes, personnel applications, etc.

It is virtually impossible to make a general statement on how a collection should be arranged because each collection is unique, and each one has to be evaluated on its own characteristics. After the basic principles governing provenance and original order have been taken into consideration, the primary objective of the archivist should be to arrange the material in the most user-friendly manner possible. Material should be arranged so logically that the researcher can quickly find needed information.

### **E. Processing, Rehousing, and Labeling**

When the plan for arranging a collection has been determined, the task of processing can begin. At this stage the processor works with one file folder at a time.

•OJM procedure for handling printed materials:

Anything not specifically **created** by the collection creator (i.e. published material) gets removed to the museum library. Even if a person wrote a name in the front cover or took a few notes in the margins of the book, it belongs in the library.

Make a folder labeled, “publications” to reside with the collection folders. In that folder you may list any publications removed from the collection to the library and any periodicals that were discarded because they are readily available from other sources. Cover and title pages may be photocopies onto acid-free paper to preserve edition information.

Diaries, journals, scrapbooks, notebooks etc. should be given consecutive numbers (Diary 1, Diary 2, or SB1, SB2) within the collection and housed in flat boxes. Again, a folder should be added to the collection boxes titled, “Oversized Items.” In this folder you will list all items removed, including textiles and objects as well as the diaries, etc.

Careful attention should be given to the physical condition of the documents.

**For example:**

- Remove paper clips and rubber bands.
- Replace rusted staples with rust proof staples, if necessary. Remove excess staples and replace with one staple only.
- If necessary, remove metal spirals from notebooks or remove pages and discard notebook cover and spirals. Photocopy cover onto acid-free paper if it contains needed information.
- Flatten folded documents. If a document is too large for a legal-size folder and too valuable to remain folded, transfer to an oversize box or a folder in the map case.
- Place photographs and negatives in polyester or polypropylene sleeves or in acid-free envelopes and remove them to the photographic files.
- Place a sheet of acid-free paper on each side of documents on colored paper (such as labor union handbills or yellow carbon copies) to prevent staining of adjacent documents.
- Encapsulate fragile documents or place in polyester sleeves.
- Trim newspaper clippings and photocopy them onto acid-free paper. Discard the original clipping.

This is also the time to discard duplicates and to decide whether those records with little value should be retained at all. Envelopes are often discarded as well unless they have unique information on them. Other documents that should be removed from the collection at this time are copies of periodicals or newspapers that are available elsewhere in the archive.

When all of these concerns have been taken care of, arrange the contents of each folder in numerical, alphabetical or chronological order as appropriate. If material is placed in chronological order, undated material should be placed after dated material. Then transfer the contents of the folders to new, acid-free folders and label each folder. Write the headings on each folder with a pencil, including the following information: Collection Number, collection, series, and folder title and dates.

The folders can now be transferred from storage boxes to acid-free, manuscript boxes. They should be arranged in their prescribed order and placed snugly in the manuscript box. Folders should not be stuffed into the box so that they are difficult to remove, nor should they be so loosely packed that in time the material will slump and bend.

Temporary labels can be clipped to each manuscript box after it is filled, but later when the processing has been completed and the finding aid written, permanent labels will be printed and affixed to each box. These labels will include the collection number, collection name, and content. If the collection, or a portion of it, is housed in an oversize box, the box label should indicate the oversize box number, the collection name, and the collection number.

By the time the finding aid is completed, the archivist will have worked with the material in each folder in the collection several times. **It is a good idea to develop the habit of taking notes on the collection during the course of these processing procedures.** The notes will be useful later when preparing the description of the collection. They should include information on the earliest and latest dates of the records in the collection, on each series within the collection, dates of and facts about important events, the purpose and history of an organization, biographical information, a record of name changes and when the changes occurred, and any other information about the collection that would be helpful to the researcher and to the cataloger.

## Chapter 4: Preservation

Preservation is an ongoing activity, performed in the course of accessioning and arranging a collection, or even after arrangement is completed. Most archivists define preservation as the actions taken to stop, prevent, or retard deterioration of archival and manuscript materials as well as improve the condition or change the format to preserve the intellectual content.

Preservation is very time consuming. The sheer bulk of modern records justifies a hard look at the amount of preservation work to be done for each collection. A processor will not do elaborate preservation work. We try to keep work to a minimum and focus efforts on preserving the information value of records rather than preserving documents as artifacts. Custom housings or extensive repairs should only be undertaken for special items by a trained staff member or outside conservator. The following procedures are undertaken to insure the proper housing and preservation of a manuscript or archival collection.

### A. Housing the Collection

Transfer all material to acid-free, folders and boxes. All folders should be the same size as the box. Unfold any documents that have previously been stored folded or rolled. If a specific item is too large for a legal- size folder, place a "document removed" note in its place and transfer it to a folder in the map case. Size the folder to the drawer, not to the item to keep it from shifting in the drawer. If several items from a collection need oversize storage, insert "document removed" notes in the appropriate original locations and put everything in an acid-free, flat oversize box. Do not, however, store bulky items with papers or photographs. Use a box that will accommodate the largest document. Cut folders the size of the box, even though items going into the box will be smaller. Materials transferred to an oversize box should be listed on the inventory in a separate series with the oversize box numbers noted. If materials in oversize boxes were never part of another series, then "document removed" forms are unnecessary.

Folders are designed to house from one to fifty or more items. How many documents are stored in a folder is a matter of judgment and depends on their age and importance. Folders that house very old manuscripts have as little as one or as many as fifteen documents. Archival collection folders will accommodate up to one-half inch of material comfortably. Crease the folder along the proper scoring line according to the bulk of the contents so that the folder rests on its flat edge in the document box. A folder with only a few items need not be creased. Use your judgment.

Document boxes should not be overfilled so that the box bulges and files are difficult to retrieve. However, neither should a box be under filled so that the contents buckle or slump.

### B. Contaminants

Collections are usually received with one or more types of contaminants attached to some of the papers. Rubber bands, ribbon, twine, and plastic folders should be removed from the materials. Metal paper clips, brads, rusty staples, metal spirals in notebooks, fasteners of any type, or metal straps which rust and damage paper should be removed. A wire cutter is useful in cutting the spirals from notebooks. Put notebook contents in a folder and discard any blank pages. Note number of pages discarded. Metal fasteners may be replaced with plastic

coated paper clips or stainless steel staples. A safer alternative is to place previously fastened pages loose in a separate file folder, or in a folder with other items but separated by a sheet of acid-free paper on each side. A note can be written in pencil on the top sheet to describe the content or number of pages that were originally fastened.

In very large archival or manuscript collections, staples, which are not rusting do not have to be removed. Staples do not rust as quickly as paper clips, and they can be replaced if or when time allows with stainless steel staples.

Cellophane tape, masking tape, and rubber cement or glue cause great damage to documents. They discolor with age and leave permanent stains. Removal from documents is difficult and time consuming and should not be attempted by a staff member without expertise or without consultation with a trained conservator. If the document is old or valuable, it might be worthwhile to attempt tape removal. Otherwise it is best to leave the item alone, isolate it, or construct custom housing for it to avoid causing more damage, which may result from the attempt to repair it.

Avoid the use of Post-it notes on any item of known permanent value, such as material entrusted to archival care. Aging tests indicate that the note's color tends to transfer to the sheets on which the notes are affixed. Adhesive residue from the note may remain on the sheet after the note is removed. Attempts to rub off the residue will do more harm than good, as the adhesive becomes further embedded in the substance to which it has been attached. Use of these self-stick notes should be limited to non-valuable, non-archival materials. Strips of acid-free paper may be used in place of Post-it notes for most archival processing needs.

### **C. Paper**

Newsprint, manila paper, and construction paper are extremely acidic. They darken with age, become brittle, and stain any papers with which they come in contact. Documents printed or written on highly acidic paper include newspaper clippings, telegrams, carbons, copies on thermofax paper, and school writing tablets.

Text on highly acidic paper should ideally be photocopied onto acid-free paper. However, large quantities of newspaper clippings of secondary importance, for example, would be too time-consuming to photocopy. Separate the clippings from other paper documents into their own folders. Photocopy any item that is badly deteriorated or on poor quality paper. Letter size, legal size, and oversize acid-free paper is available. The original item may be discarded at the discretion of the curator. Items may have value as artifacts or for future exhibition. Such items are encapsulated in Mylar. Sometimes a photocopy of a brittle, encapsulated item is also made and researchers are encouraged to use it instead of the original.

### **D. Oversized Material**

Oversized documents and other items (above 8 1/2" x 14") will not fit into a legal-size document box when unfolded or encapsulated. Examples are legal or financial documents, muster rolls, certificates, diagrams, photographs, scrapbooks, albums, posters, galley sheets, etc. Items in this category are stored flat in large flat, acid-free, lignin-free document boxes or in an acid-free folder sized to fit the box or oversize drawer. Smaller bound volumes such as diaries, journals, albums, scrapbooks, etc., which are no more than a half inch thick can be stored in an acid-free folder or envelope. It is acceptable to store such items spine down in



document boxes without folders if necessary. They may be wrapped individually in mylar or acid-free paper depending on condition. A label can be attached to the mylar or paper covering. Oversize bound volumes are not usually stored in a box with other documents or photographs. If they are heavy enough to shift, they will cause damage to the other items. Old volumes with leather bindings should be wrapped in acid-free paper, spun polyester, or mylar and boxed together if the bindings have red rot.

### **E. Photographs, Audio Tapes, and Films**

Photographs mounted on acidic pages of an old album or scrapbook present a special problem. Each album and its contents must be evaluated individually. Albums of this type can be photographed or photocopied page by page to maintain a record of the original historical arrangement and descriptions. The photos can then be removed and stored in the photograph collection. Often the best solution is to interleave the pages with acid-free paper between the pages to neutralize the harmful effects of the original pages and keep the item intact. If the album cannot accommodate the bulk added by protective sheets, disbinding may be required. Loose sheets can then be boxed.

Photographs, oral history tapes, films, video tapes, and artifacts should be separated from the paper part of the collection and stored in separate areas so that their unique formats may be accommodated. Photographs 8" x 10" and under can be stored either in archival folders interleaved with acid-free paper (non-buffered if they are color or albumen prints), in acid-free envelopes, in albums, or in mylar or polypropylene sleeves or pages designed for storage of photographs. Rolled photographs may be stored rolled if absolutely necessary or may be humidified, flattened, and wrapped with an acid-free board support for storage. Negatives and photographs are never stored in the same envelope, sleeve, or folder although they can be stored in the same box.

Slides and photographic negatives should be housed in archival slide and film protectors designed for the individual size and format. Photographs over 8" x 10" and mounted photographs must be stored flat in oversize boxes. Cased photographs, such as tintypes, daguerreotypes, or glass negatives, need custom containers to protect them. They may be protected by wrapping them in tissue paper and storing them horizontally in flat storage document boxes. Microfilm storage boxes are also useful for smaller cased photographs.

Put no more than ten photographs or approximately a quarter inch in each folder. This is a general rule of thumb adhered to by most photographic archivists. Interleaving the prints with acid-free paper is optional. However, if the prints are on acidic board, have clippings attached to the verso, or if any kind of transferable marker or ink was used by the original owners to write identifications, acid-free paper should be used to protect adjacent prints. Fragile prints should be stored in sleeves and filed in folders. Very fragile prints should be stored flat with a piece of supporting mat board and a Mylar enclosure. Consider the value of the material. The more valuable or unique it is, the more carefully it should be housed.

Photographs stored vertically must be stored in full boxes or in polypropylene pages in a firm notebook to retard curling. Never affix a gummed label on the front or back of a photo. Information about a photo is placed on its verso in pencil and only along its border. Information can be written on a piece of interleaving paper placed behind the photo or on the envelope or folder in which it is stored. Excessive photocopying of photographic prints of

any kind should be avoided. Copy prints and scans should be made of frequently used photographic materials.

## F. Basic Techniques for Repairing Documents

Simple repairs and conservation steps are undertaken on manuscript and archival materials keeping in mind that any repair should be durable, reversible, but harmless to the item being treated. Consultation with a professional conservator is advised for complicated preservation or storage problems. Learn to distinguish between repairs that you are capable of doing with the equipment on hand and that which is best left to the experts!

- To remove staples use a microspatula, especially on old manuscript materials. Bend up the prongs on the verso of the paper group, then lift off the top of the staple at the front of the document with the microspatula. Staple removers on modern documents in good condition are acceptable if done carefully.
- To clean soiled documents, use the powder from a document cleaning pad or cleaning powder. Rub the powder gently in a circular motion with your fingertips. Brush dirt into a waste container. A soft eraser may be used for stray marks. Do not use cleaning powder on documents written in pencil or on chalk drawings. This technique is primarily for soiled printed materials.
- Before washing any document, clean the surface first to remove any loose dirt. Gently test a small area of each color of ink for solubility with a Q-tip dipped in water. If any color lifts off the item, it should not be washed. Wash documents in a shallow amount of cool, clean water in a flat photo tray. Put a sheet of screening or woven polyester in the bottom of the tray and on top of the item to support the wet document. Allow it to soak for approximately 30 minutes. Check frequently. When the tape or glue is loose, gently remove it with your finger. Remove the document from the tray by lifting the item sandwiched between the screening or polyester and allow it to drip dry for several minutes. Blot excess water between two sheets of blotter paper, then place it between two dry blotters and flatten it. Do not wash documents that have water soluble inks, watercolors, or chalk. Wash items to remove oils, water soluble dirt, glue, stains, or tape and to flatten very wrinkled or creased, brittle paper. Don't take a chance with precious, valuable, irreplaceable documents. There are other washing methods that use specific chemicals that only a trained conservator should attempt. If in doubt, leave it alone!
- To remove tape from an item, use a small scalpel or exacto blade and 200 proof alcohol. Blot the tape on the verso of the item with 200 proof alcohol, let it sit a few minutes to loosen and carefully remove the tape. Use an eraser or a tacky remover to remove the residual adhesive. This procedure is extremely time consuming and can be tricky. Do it only if the tape seems newly attached and easy to remove. Don't remove tape on a dirty item because the liquid will leave tide marks (wavy dark water lines.)
- To flatten creased or wrinkled materials, spray the verso with a light spray of water and dry between sheets of blotter paper under weights. If the item is delicate or a photograph, spray the blotter paper that will be in contact with the unprinted verso and flatten.
- To mend tears in documents, use document repair tape on the reverse side of the document and only along tears that have no writing or printing if possible. Japanese mending tissue and rice paste or methyl cellulose glue are used to mend older manuscripts. Photographs can also be mended using Japanese mending tissue or document repair tape on the reverse side.

- Encapsulation is used to protect brittle, torn, or fragile but frequently used items. To encapsulate a document, cut a piece of 3 mil mylar at least one inch larger than the document on all sides. Lay one sheet of mylar on a clean surface. Clean the mylar with a soft cloth to remove dust and create a static charge. Place the document at the center of the mylar and use a soft weight on the document to keep it from shifting. Place a strip of 1/4" 3M encapsulation tape along each side of the document approx. 1/8" from the item leaving a gap at the corners. Place the second sheet of mylar on top of the document as you remove the weight. Place the weight on top of the three items and clean the top sheet of mylar with a soft cloth. Reach under each edge in turn and remove the protective paper from the tape, letting the mylar fall quickly in place to seal. Press out the air after removing each piece of tape with a squeegee or cloth to create more static and clean any dust off the Mylar. Trim the borders to 1/4" and round the corners.
- We do not have the facilities or chemicals to deacidify documents. At best highly acidic items should be encapsulated with a piece of acid-free, buffered paper backing.
- We also do not have the facilities to flatten curled documents or photographs. These need to be placed in a humidifier.
- To kill mold, put the document in the sun for several hours. When mold is dry, brush or vacuum it off. Do this outdoors and use a protective facemask and gloves. Mold is dangerous to handle and can cause health problems for anyone who handles infected items. Isolation of the item from other library materials is necessary until a decision is made to reproduce the item and discard it. To remove a moldy odor, place a document in a plastic garbage bag with a small box of charcoal briquettes. Seal the bag and leave it for a week.

## Chapter 5: Description

The finding aid is compiled specifically to describe the arrangement and contents of a collection and to comment on its research potential. It serves the researcher seeking information about a person, family, or organization; serves the staff in locating desired materials; and serves the donor as a record of material deposited. The finding aid should be written in clear, concise language, in a tone free of value judgments, personal bias, or professional jargon.

In 2007, OJM adopted standards recently approved by the Society of American Archivists for creating archives records and finding aids include the following parts:

- Collection Number/ Collection Title (assigned by the curator)
- Biographical/Historical Sketch
- Arrangement Statement
- Scope and Content Note
- Series Description (if collection is processed to this level)
- Immediate Source of collection and custodial history
- Publication Rights
- Restrictions to Access
- Related Materials List

Each part will be discussed separately accompanied by brief examples. Sample finding aids are included in the appendices.

### Biographical or Historical Sketch

The purpose of the sketch or history is to give the researcher a brief, general introduction to the person or organization that created the collection. Prepare a sketch or history in narrative form that highlights major events in the past of the person or organization primarily during the period represented by the collection. The description may include limited background data. If more than one person or organization is very important to the collection, prepare a short biography or history for them also. Write your text in clear, concise language including accurate data. Your text may range anywhere from two paragraphs to two pages at most.

Books or useful articles by or about the person or organization, which would be useful to the researcher, should be listed in bibliographic format and follow the narrative.

### Example: Biographical Sketch for and Individual

William Ransom Hogan, historian, writer, and teacher was born in Toledo, Ohio, November 23, 1908. He grew up in Texas, where he was educated and earned his undergraduate degree from Trinity University in 1929. He received the M.A. in 1932, and the Ph.D. degree in 1942 from the University of Texas. Hogan was an instructor at Ranger Junior College and regional historian with the National Park Service before serving as an archivist at Louisiana State University, where he became department head in 1946. He spent a year at the University of Oklahoma as associate professor before

returning to Louisiana as associate professor of history at Tulane University in 1947. He was appointed professor of history in 1950 and served as chair of the History Department at Tulane from 1953 to 1968. Hogan died in September 1971.

Dr. Hogan was founder and faculty administrative director of the archives of New Orleans Jazz, a Guggenheim fellow, and a Captain in the United States Army during World War II. His academic specialty was United States social and cultural history. Among his publications are: *The Texas Republic: A Social and Economic History*, co-editor of William Johnson's *Natchez: the Ante-Bellum Diary of a Free Negro*, and co-author with Edwin A. Davis of *Barber of Natchez & Tales from the Manchaca Hills*.

### Arrangement Statement

The Arrangement Statement describes, in narrative, the current arrangement of the materials. It may also provide information about previous arrangements *if* they are important to the understanding or use of the materials. A whole-to-part relationship should be included here to link the various series and sub-series of a collection. i.e. “This collection is divided into three series as follows: Financial Records, Personal Papers, and Travel photographs...”

### Scope and Content Note

The scope and content note is an expanded version of the series description and briefly describes the content of the collection but with sufficient detail to provide the researcher with a good understanding of the collection's general characteristics, strengths, and weaknesses or gaps. It also may include a statement regarding the original condition of the collection, a summary of the archivist's processing and preservation decisions, and the amount and types of materials that were removed from the collection.

Describe in essay form and at a minimum note the document types and/or subjects represented with inclusive dates, the extent of the materials, primary correspondents, and significant or unusual items. Describe these major elements in the order in which the materials are physically arranged. Information regarding significant aspects of a person's or organization's past should be related to the description of the papers or records. The scope and content note is the archivist's opportunity to relate the collection and its relevance to the creator and, if possible, to the events at the time of its creation.

Refer to a thesaurus (such as the Art and Architecture Thesaurus – on line) for standard terms used for document types.

### Example: Scope and Content Note(Person)

The collection, in six legal-size document boxes, is composed primarily of research materials collected by Arista Joyner for use in compiling her *Arlington Journal* columns as woman's editor, 1951-1954, and for her publications on the history of Arlington and surrounding areas of Tarrant County, Texas. Included are correspondence, newspaper clippings, photocopies of original documents, maps, photographs, oral history interviews, biographies, genealogies, tour guides, booklets, newsletters, brochures, articles, notes, and typescripts of manuscripts dating from 1836-1986. Notes for her historical works are expressed in the format of a timeline of Arlington area history and



customs, as she prepared it, affixed to unprinted newsprint. Photocopies and original sketches of illustrations by Joyner, which were used in her publications, are also included.

The collection is organized in three series. The first series is the Historical Organizations Files, which consist of Joyner's correspondence files with the Arlington Historical Society, the Bicentennial/Centennial Committee, the Tarrant County Historical Commission, and the Texas Historical Commission. The second series is Publications Files, which consist of a variety of materials related to the publication of *Arlington: Birthplace of the Metroplex, 1838-1910*, such as clippings, copyright forms, a bibliography, illustrations, indexes, and page layouts. Only a few items relate to her other publications, *Arlington, A Pictorial History and Tour Historical Sites in Relation to Arlington*. Also included are some clippings of her history column, but no original manuscripts related to her work at the *Arlington Journal*. The last series is the Research Files, which were arranged in alphabetical order by subjects assigned by Joyner. The titles and organization of these files were revised somewhat during processing. The Research Files comprise the bulk of the collection and contain the widest variety of materials as noted above. Oral histories include interviews by Joyner with Bess Marney, Loraine Raines, Ella V. Day Vincent, and Tressie Watson, women descended from early Arlington pioneer families. The oral histories are not transcribed.

Newspaper clippings were photocopied onto acid-free paper and the original clippings were discarded. Duplicates of clippings and photocopied materials were also discarded. The materials in each series and folder remain in the same order as received, but the series order was decided by the processing archivist.

The Arista Joyner Papers reflect the social customs, family histories, and commercial development of Arlington during the formative part of its history. Documentation concerning local Indian settlements and life along Village and Rush Creeks prior to and during the Anglo encroachment is in the collection. Information on pioneers, such as James D. Cooper, John B. Denton, James W. Ditto, Middleton Tate Johnson, Patrick A. Watson, and many others, is also included.

### **Example: Scope and Content Note (Organization)**

The records of the Society for the History of Discoveries consist of materials accumulated since the Society's creation in 1960 through 1991. Contained in fifteen legal-size document boxes, the materials include correspondence, a constitution, annual reports, minutes, financial documents, photographs, and files related to the Society's yearly publication, *Terrae Incognitae*.

The collection is divided into four series: Correspondence, Annual Reports, Meetings, and *Terrae Incognitae*. The first series contains two subseries; Officer's Correspondence, which includes copies of correspondence between the officers of the Society and other members of the Society; and Membership Correspondence, which includes letters to the secretary regarding membership, dues, and annual meetings, 1960-1990. Letters

regarding the formation of the Society, a constitution, and the articles of incorporation as well as letters proposing a new name for the Society are included with the Officer's Correspondence. Series two, Annual Reports, consists of copies of reports that were mailed to all members, 1962-1990. The reports contain the financial statement for each year, updated membership lists, and information about meetings and the Society's publication, *Terrae Incognitae*. Series three, Meetings, includes programs and reports of annual meetings, proposed papers and comments, correspondence regarding meetings, and photographs, 1961-1990. It also contains minutes of yearly business and council meetings. Series four, *Terrae Incognitae*, contains correspondence from members to the editorial board concerning the contents and printing of the yearly publication, 1962-1989. Correspondence for 1970-1971 is missing.

The original order of the collection was maintained. All materials within each series are arranged chronologically. Contents of folders that were received in reverse chronological order were refiled in chronological order. Undated materials were placed at the end of each folder. The only other change involved rewording some folder headings for clarification. Several of the financial documents, specifically deposit and withdrawal slips, bank statements, returned checks, and also miscellaneous advertising materials were discarded. Treasurer's reports, ledgers, and budgets maintained in the collection reflect the financial records of the Society.

Those interested in the development of cartography or geography as an academic field will find these records particularly valuable.

### Series Description

The series description introduces the arrangement of the collection and provides a concise statement of the files within each series. The series description should include the following elements in this order: title, inclusive and bulk dates, quantity in linear feet with number of boxes or folders, arrangement, and a very brief summary of contents or principal subjects. Series should be listed in order of importance, if possible, otherwise alphabetically. A series description is optional, depending on the size of the collection and number of series. Bold the series title headings as shown below. Subseries, if they exist, can be described within the series description, such as when financial records are divided into subseries by record type.

#### Example: Series Description

The Trussell Family Papers are arranged in ten series:

**Series I. Correspondence, 1832-1962.** 1.25 linear ft. (3 document boxes). Arranged chronologically. Letters to and from Trussell family members and friends in Mississippi and Texas.

**Series II. Financial Records, 1837-1940.** .24 linear ft. (10 folders). Arranged chronologically. Bills of sale, statements, promissory notes, county, state, and school tax receipts, poll tax receipts, insurance policy, miscellaneous receipts, and a plat map.

**Series III. Legal Documents, 1831-1924.** .08 linear ft. (4 folders). Arranged chronologically. Legal forms for power of attorney, transfers of title to property, executor of estates and rental agreements, deeds, and statements.

**Series IV. Literary Works, 1850-1882.** .25 linear ft. (12 folders). Arranged chronologically, some undated materials. Religious sermons, political speeches, essays, memorials for deceased relatives, poetry, prayers, and stories by various family members.

**Series V. Printed Material, 1838-1945.** .13 linear ft. (6 folders and one oversize item). Arranged chronologically. Newspaper clippings, broadsides, pamphlets, and brochures.

### Container List

If processing continues beyond the series level, prepare a list of the folder titles that were created or determined during the arrangement of the collection. The heading at the top of **each page** of the container list should include the collection number, collection title, and the words "Container List". Follow it by the series title if there is one.

If an item or the contents of a folder is undated, estimate the date from the context of the collection. Circa dates are designated as: ca. 1950 or c. 1950. Use n.d., no date, or undated if a date cannot be determined. **Short descriptions, subjects, or names of correspondents, if they are important but not reflected in the folder title, may be described on the next line below the title and indented a few spaces. Examples:**

Correspondence, 1862-1863    Letters from officers in the field. Includes one facsimile letter by president Abraham Lincoln.

Diary, 1949-1962    Capps' experiences as a rookie school teacher, machinist, and writer.

### Immediate Source of collection and custodial history

A statement about how the materials came to be at OJM and where they were before that.

### Publication Rights Statement

Include a statement as follows indicating that a researcher should obtain permission to publish materials from the curator.

“Permission to publish, copy, reprint, digitize, orally record for transmission over public or private airways, or use material from the Name of Collection Papers in any and all other current or future developed methods or procedures, must be obtained in writing from the Oregon Jewish Museum. All rights are reserved and retained regardless of current or future development or laws that may apply to fair use standards.

**Restrictions to Access**

Any restrictions placed on access to a collection by its donor must be clearly stated. Restricted items should be in a folder with a flapped top that can be sealed and marked as to the date it becomes available for research.

**Related Materials List**

Compile a list of books, graphics, maps, artifacts, etc., that were placed in a different location (i.e. library, oversized storage, photograph file, etc.) This is also the place to include finding aids from other institutions who have collections relating to this one.

## Archival Collection Processing Checklist

Archive Number: \_\_\_\_\_ Accession Number: \_\_\_\_\_

Collection Name: \_\_\_\_\_

\_\_\_\_\_ Preliminary inventory completed, original arrangement noted

\_\_\_\_\_ Background research information on collection completed

\_\_\_\_\_ Related collections explored and researched

\_\_\_\_\_ Albums and Scrapbooks numbered

\_\_\_\_\_ Processing Plan and Series list created

\_\_\_\_\_ Materials arranged according to plan (amend plan as necessary)

\_\_\_\_\_ Items, enclosures and folders annotated

\_\_\_\_\_ Boxes labeled

\_\_\_\_\_ Finding aid created

\_\_\_\_\_ Artifacts cataloged

\_\_\_\_\_ Books cataloged

\_\_\_\_\_ Photographs cataloged

Notes:

Processed by \_\_\_\_\_ Date \_\_\_\_\_



## Processing Plan for the (Fictional) Cohen Family Collection

Prepared by: \_\_\_\_\_ Date: \_\_\_\_\_

Archive Number: \_\_\_\_\_ Accession Number(s): \_\_\_\_\_

Date Range: \_\_\_\_\_

### Overview:

The (fictional) Cohen family settled in Portland in the 1890s and opened a series of dry goods stores which eventually became the Cohen Department Store in 1920. They owned a family home in NW Portland at 13<sup>th</sup> and Flanders as well as property in east Multnomah County where the family had a summer home. They were active at Temple Beth Israel, founding members of the Tualatin Country Club, and active at the Jewish Community Center. Son Benjamin fought in World War I; his son Nathan fought in World War II.

### Research Sources to Consult:

Jews of Oregon – Steve Lowenstein  
The Making of an Ethnic Middle Class – William Toll  
Oregon Historical Society archives

Restrictions placed by donor: none

### Proposed Series:

Series 1: Family letters and scrapbooks  
Series 2: Cohen Department Store  
Series 3: other family businesses  
Series 4: Tualatin Country Club  
Series 5: Photographs (removed to photo file)

[Note: You will include more detailed information on series and decide if sub-series are needed as processing proceeds, depending on the size and complexity of the collection.]

**Oregon Jewish Museum  
ARCHIVES PROCESSING WORKSHEET**

**Minimum Required Elements**

CollectionNumber	
Creator	
Collection Title	
Dates (include Bulk dates)	
Extent (physical description)	
Scope & Content  (consult a thesaurus to find standard classification terms for archival items)	
Restrictions to Access	
Languages of the materials	
Related Materials	

**Notes:**

**Oregon Jewish Museum  
ARCHIVES PROCESSING WORKSHEET Page 2**

**Additional Elements**

Biographical Note  (or organizational history)	
System of Arrangement  (whole to part relationship)	
Immediate Source	
Copies/originals	
Publications using these materials	

**Notes:**

Processor \_\_\_\_\_

Date \_\_\_\_\_

# Providence Archives, Mother Joseph Province

## Volunteer Handbook

### General Information for Volunteers

General telephone number: 206-937-4600

General email address: [archives@providence.org](mailto:archives@providence.org)

Staff Hours: Monday through Friday, 8:00 a.m. to 4:00 p.m.

Researcher Hours: Monday through Friday, 9:00 a.m. to 3:00 p.m., by appointment

Mailing address:

Providence Archives  
4800 37<sup>th</sup> Ave SW  
Seattle, WA 98126

### Staff

Loretta Z. Greene

Archivist

206-923-4010

[loretta.greene@providence.org](mailto:loretta.greene@providence.org)

Emily Hughes Dominick

Associate Archivist

206-923-4011

[emily.dominick@providence.org](mailto:emily.dominick@providence.org)

Peter Schmid

Visual Resources Archivist

206-923-4012

[peter.schmid@providence.org](mailto:peter.schmid@providence.org)

Pam Hedquist

Assistant Archivist-Technical

509-474-2319

[pamela.hedquist@providence.org](mailto:pamela.hedquist@providence.org)

### General Rules

Keep your hands clean

Keep your work area neat

Handle all materials with care

Use only pencil when taking notes by hand

Enjoy food and drinks only outside of the storage rooms. If you are working with archival materials, whether original or secondary documents, make sure you don't have any food or drinks on your work surface.

### **Time Card**

Fill out the number of hours you worked (round to the nearest quarter-hour) on the time sheet along with the project(s) you worked on for that day.

### **Computer Workstations**

If you need computer access, you will be assigned a Providence login.

### **Keys**

Ask any staff member to access any storage areas that might be locked.

### **Supplies**

Acid-free folders, Hollinger boxes and acid-free paper as well as other general office supplies are in the Storage Aisle of room 215.



## Shelving and Retrieving Archival Materials

Archival collections are housed in various types of containers in the compact shelving units in the stacks area.

In general, each collection is assigned a record group number or name. The numbered collections are in Room 215, accessible through the Processing Room, and are arranged in numerical order, starting with (22) Providence Academy, Vancouver.

Please use the step stools to reach the highest shelves.

Draw a Hollinger box from the shelves by gently pulling on the string attached to the bottom. Grasp the bottom and sides.

Support boxes on the bottom as you carry them in and out.

Some boxes may be heavy to lift or retrieve.

If the containers are heavy, large or unwieldy, ask for help!

If you need to transport several boxes at once, place them on a cart.

Upon returning them to the shelves, place boxes so they do not extend beyond the shelf depth, if possible.

Volunteer Handbook, Providence Archives, Seattle

## Archival Processing / Guidelines for Processing a Collection

*P qvg<Uqo g'ēqpvqpv'ēfcrvqf 'It qo 'tt qegulpi 'ft gēwqpu'qhtCwi wūcpc 'Eqngi g'UrgektEqngēwqpu 'TqemKūcpf. 'KN0'*

Read pp. 49-60 in Understanding Archives and Manuscripts by James O'Toole.

Read pp. 3-10, 19-30, 54-55, 57-68, and 69-78 in Arranging and Describing Archives and Manuscripts by Frederic M. Miller.

Read pp. 13-40, 59-62, 73-75, and 93-104 in Describing Archives: A Content Standard (DACS). A finding aid (also known as a finding guide, a collection guide, an inventory, or a descriptive system) is a tool that allows researchers access to a group of original materials, much like an online catalog record describes the form and content of a book. If you are interested in the theoretical basis for the data elements included in DACS, read the “Statement of Principles” on pp. xi-xv.

If you will be processing a hospital collection, review the finding aid for collection (60) St. Mary Medical Center, Walla Walla, Washington. For a school collection, review the finding aid for collection (181) St. Finbar School, Burbank, California.

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The following is a suggested order of operations for arranging and describing archival and manuscript collections.

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Obtain the Accession information if possible. Read these and determine when and by what means this collection came to Providence Archives.

Conduct a preliminary survey of the collection materials, taking notes on the following information:

**Who or what organization created the records.** (If most of the materials are written ABOUT and not BY an individual or an organization, bring this to the attention of your supervisor before continuing.)

**The range of dates the materials cover.**

**The language(s) of the materials.**

**The types of materials present.** Unless the collection is very large, list each item along with notes about the purposes it served the creator. This information will serve as the basis for the Scope and Content element, as well as a preliminary Container List.

**The organization or arrangement of the materials AS RECEIVED.** Please DO NOT change the order at this stage!

**Preservation needs.** You may do some preservation work as you go along, so as not to be over-handling materials. Remove paper clips, staples, etc. Gently flatten corners and folds. Remove letters from envelopes (but keep them together). Measure items so you can obtain the appropriate folders and containers. Ask questions!

**Content.** Note important information you find in the records about the individual, family, company, or organization that created them. These notes will serve as the basis for your historical note or biographical sketch.

Gather additional information about the person or organization to supplement your notes on the content of records in the collection. Write a preliminary Administrative History/Biographical Sketch element note, providing the context in which the records in the collection were created. There are some good examples of biographical sketches and administrative histories on pages 95-104 of DACS. You can also use existing finding aids as guides.

Next, think about how to best organize the materials in the collection. It is preferable to keep records in the order they were received (the archivist's term for this is **original order**), as it can reveal something about the creation of the records in their context and their relation to other records. If the original order makes sense, propose an arrangement that follows the hierarchy below. Each major set of materials will be a series, and further subdivisions of each of the series will be subseries. For some types of collections, such as an organization's records, the series will

naturally present themselves. These are usually record types, such as meeting minutes, correspondence, financial records, etc. Think of this as a means of preserving the records as best as possible as well as putting them in order so that they will be easily accessible.

If there is no discernable order, you may have to impose an artificial one. Think about dividing larger groups of records into smaller sets or assembling documents and sets into larger aggregates that make sense for what the collection contains. An individual's correspondence might be arranged chronologically, with each series a range of dates.

This is the hierarchical arrangement scheme used by archivists:

**Collection** - All the materials created by a person or organization, or those centered around a specific topic.

**Series** - Divide into major topics (by format, content, chronology, etc.)

**Subseries** - To distinguish more specific examples of the series.

**Folder** - An actual folder.

**Item** - An individual piece in the collection.

Propose an arrangement for the collection in outline form. Propose series headings (followed by a date range, e.g. Correspondence, 1923-1955) along with a brief description of what it will encompass. It is not necessary to outline to the folder or item level at this stage.

Present your document with information you have collected and proposal for the arrangement of the collection, along with any handwritten survey notes, to your supervisor.

Meet with your supervisor periodically to discuss the arrangement of the collection, the progress of your work on the data elements, preservation issues, and storage containers.

Once your arrangement scheme is approved, prepare a statement for the System of Arrangement element. It can be as basic as a list of the Series and Subseries headings you have established. This information may change as you begin to put the materials in the collection in physical order.

Collect the storage supplies you will need to house the collection. Acid-free folders and boxes will help protect the papers from environmental factors like light, dust, and acidic materials.

Roughly regroup the records into the major series divisions according to the approved arrangement.

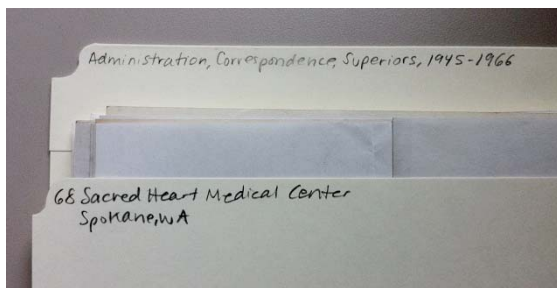
Especially fragile items should be cared for at this time. Some items may need individual housing like a custom-made boxes or Mylar enclosures.

Begin to folder items or logical groups of items according to your arrangement. At this point, READ/LOOK CAREFULLY AT the items you are re-housing to make sure you are putting

them in the right place and to gather more information for the text of the Scope and Content and Administrative History/Biographical Sketch elements.

Archival folders are manufactured with scored edges in the fold in order to expand to contain larger batches of records. If you need to expand further than the allotted edges, divide the contents between two or more folders. In the case of placing a book in a folder, it is okay to expand the folder to fit the bound volume.

Label each folder with the collection number, collection name, series title, folder title, and inclusive dates of materials. DO NOT number the folders. For example:



Begin creating your Container List by recording the folder titles.

Separate any items from the collection that do not belong. This includes duplicate materials and items that appear to have been misfiled. Keep all separated items together and make sure to fill out a separation form. Ask your supervisor or another processor to double-check the list of items on the form against the items to be separated.

The items that are separated will be discarded, returned to the donor, returned to the creating department or organization, transferred to another collection, or donated to a more appropriate repository. What happens to these items really depends on the desires of the donor as recorded in the Gift Agreement.

Place folders in boxes. A box should not be too full or too empty. If a box is too full, records can be damaged by constant friction of cramming records into the tight space and then facing the difficulty of pulling records out. To alleviate this problem, remove enough records so as to have a comfortable fullness in the box. If it is too empty, folders and records are bound to curl in the box. If there is extra room in a box, use a Hollinger board space-filler or use a smaller box.

If at all possible, records should lie flat in clamshell boxes. If various sized records are put in the same box, records will not be as stable and are apt to shift around and possibly become damaged.

It may become clear that you need to add/subtract or re-arrange series groupings while you are in the midst of processing. Please be sure to check any changes with your supervisor. If you do make changes, you will need to revise the text of the System of Arrangement element.

Make note of any additional information you learn about the creator in the course of re-housing and update the text of the Administrative History/Biographical Sketch element.

When you have re-housed all of the materials and completed the Container List, double-check the list against the final physical arrangement of the records.

Prepare a Scope and Content note. Keep it brief and objective in tone. It is a simple summary of what is in the collection, not an opportunity to interpret the content of the materials or to describe your work to process the collection. Include the types of materials, the date range, and the topics covered.

There are also some good examples of Scope and Content notes on pages 36-38 of DACS. Please DO NOT use Scope and Content notes in finding aids produced before 2009 as examples to follow.

Count the number of containers housing the collection, calculate the linear feet (the amount of space the boxes take up when placed next to each other on the shelves) and write a statement for the Extent element in decimal format. These are the calculations for the standard-size boxes used in Special Collections:

Standard upright Hollinger box	5 inches	0.4 linear feet
Half-Hollinger box	2.5 inches	0.2 linear feet
Flat clamshell box	15 inches	1.2 linear feet

Include the number of containers in parentheses after the measurement, like so: 2.0 linear feet (4 boxes).

Once you have discovered all there is to know about the collection, work with your supervisor to assign access points. These name and subject headings are the best way to briefly convey what is contained in the collection. They are also useful to researchers who may be looking for connections to other collections and library materials.

Record the names of other Providence Archives materials related to the collection in the Related Materials element.

Check your finding aid document to make sure you have completed all of the data elements.

Print out a copy of the finding aid draft and assemble the collection containers for review by your supervisor.

After meeting with your supervisor, make final changes to the finding aid and the physical arrangement of the collection.



Make container labels. Attach an adhesive label holder to the outside of the box. In pencil, write the MSS number and the collection name on one of the label-sized pieces of paper. Place the paper label inside the label holder.

Shelve the containers in the appropriate place on the compact shelving units in the stacks area.

## Preservation

### Photocopying for Preservation Purposes

- First, you must decide if the document to be photocopied will survive the process. You are making the photocopy to help preserve the document.
  - Certain materials, like newspaper, are highly acidic and will become yellow and brittle very quickly.
  - Certain inks may fade over time, resulting in an unreadable written document.
- If you are photocopying for preservation purposes, always use acid-free paper.
  - Acid-free paper is located in the processing room, on the bookshelf near the copy machine. You can tell it is acid free if you see a Permalife™ or similar watermark on the page when you hold it up to the light.
- If you are photocopying part of a bound document, such as a book or pamphlet, be sure that you rest the gutter of the book on the book rest provided on edge of the copy machine. This will help prevent stress on the spine. Copy one page at a time using this method.
- You may need to adjust for size and brightness of the photocopy. For example, if you are copying a letter in which the ink has severely faded, you may want to darken the photocopy so that the writing comes out more clearly.
- Depending on the nature of the material you're photocopying, we may or may not keep the original. For example, we tend to throw out the original newspaper clippings, but we tend to keep original 19<sup>th</sup>-century letters. Ask your supervisor if you're unsure whether or not to discard an item.
- If you are photocopying newspaper clippings, make sure the entire citation of the article shows on your copy. If it doesn't show, write the complete citation of the article in pencil on the page.

## General Orientation Reading/Viewing List

### Sisters of Providence and Corporate History

- Emilie Gamelin brief biography
- Mother Joseph of the Sacred Heart brief biography
- The Good Work
  - [Sisters of Providence] for 125 Years in the West, 1981
  - 1859-1984: 125 Years of Corporate Caring, 1984
- Videos (RCL=Religious Community Library; PA=Providence Archives)
  - Fruit of the Vine: Emilie Gamelin and her Prophetic Mission (33 min., 1992, RCL DVD0200)
  - Beggar/Builder: The Story of Mother Joseph (37 min., 2002, RCL DVD0197)
  - Mother Joseph: A Sister of Providence (17 min., 1987, PA VHS V0350)
  - The Sisters of Providence: 150 Years in the West (20 min., 2006, RCL DVD0011)
  - Challenge of Change (13 min., 1991, PA VHS V004)
  - Providence Women on the Frontier (30 min., 2001, RCL DVD0201)
  - Introducing Providence Ministries (5 min., 2009, RCL DVD00176)

# Shelburne Museum

## Volunteer Application Form

### Shelburne Museum Volunteer Program

As a non-profit educational organization, Shelburne Museum welcomes volunteer assistance. Volunteers play an important role in the growth of the Museum and fulfillment of its mission, and each person makes a special contribution.

Each volunteer is an important extension of the Museum's regular staff: volunteers assist in nearly all departments. Job assignments are developed around both the Museum's needs and the volunteer's skills and interests. There are times when one or more of our departments has a full roster and cannot accept additional volunteers. In this event, you may either select additional interests on the application form, or be advised we will keep your application on file until we have an opening in your preferred department.

To become a Shelburne Museum volunteer, please complete the attached Volunteer Application Form and return it to my attention. I will then contact you to schedule a conversation about what available projects might suit you. You are welcome to try out a few different positions before selecting one or two departments that fit best. You will receive an orientation and training in your project area from your departmental supervisor.

All volunteers, with the exception of single-visit corporate or school groups, are asked to fill out this application. Once a volunteer assignment has been made, a timesheet will be provided for you to record your hours during the given year: please remember that you are responsible for recording your hours.

Finally, a schedule of benefits is attached; please contact me after you have completed 25 or 100 hours to redeem your benefits.

We're all looking forward to working with you. For more information, please contact me any time.

All the best,

Cathy Walsh  
Shelburne Museum  
Volunteer Manager  
P.O. Box 10  
Shelburne, VT 05482  
(802) 985-3346 x3350  
cwalsh@shelburnemuseum.org

## **Volunteer Benefits:**

### **0-25 volunteer hours completed per year:**

- Free admission to Museum with temporary ID on days you are volunteering
- Invitations to volunteer social events
- The chance to learn more about Shelburne Museum, to meet new people, and to make a difference in your community

### **25-100 volunteer hours completed per year:**

- All of the above, and
- Free unlimited admission to the Museum with your professional ID badge
- Free Individual Membership to Shelburne Museum
- 10% discount in the Museum Store and Café with your ID badge
- Invitation to annual recognition dinner

### **100+ volunteer hours completed per year:**

- All of the above, and
- Free Family Membership to Shelburne Museum
- Four complimentary day passes to Shelburne Museum; for each additional 100 hours volunteered in the same year, 2 additional day passes (maximum of 10)
- Special acknowledgement at annual recognition dinner

## shelburne museum volunteer application form

Full Name: \_\_\_\_\_ Nickname: \_\_\_\_\_ Date of Birth: \_\_/\_\_/\_\_

Street Address: \_\_\_\_\_

Town: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Is this a seasonal address? \_\_\_\_\_ If yes, what months are you at the above address? \_\_\_\_\_

### skills & hobbies

- Skills (computer skills, sign language, bookkeeping, foreign languages, musical instruments, carpentry, sewing, quilting, gardening, CPR, etc.):
  
- Other interests, hobbies, activities:

### education & experience

Volunteer Experience(s): \_\_\_\_\_

Employment background: \_\_\_\_\_

Educational background (Please indicate highest level completed): \_\_\_\_\_

Personal Reference: \_\_\_\_\_ Telephone/email: \_\_\_\_\_

### volunteer interests

Check all areas of interest that apply:

- \_\_\_\_\_ Administrative/office work (bulk mailings, clerical, etc.)
- \_\_\_\_\_ Buildings (carpentry, painting, etc.)
- \_\_\_\_\_ Collections Management
- \_\_\_\_\_ Conservation (data entry, clerical, sewing, assistance with ongoing conservation projects)
- \_\_\_\_\_ Gardening and/or Landscaping
- \_\_\_\_\_ Raffle (selling tickets outside store or exhibition)
- \_\_\_\_\_ Special events (Lilac Sunday, SM Goes to the Dogs, Haunted Happenings, etc.)
- \_\_\_\_\_ Quilt Demonstrating (or rug hooking, or other craft: please describe \_\_\_\_\_)
- \_\_\_\_\_ Education (monitoring the Art Cart, Owl Cottage, etc.)
- \_\_\_\_\_ Other: please describe \_\_\_\_\_

## availability

- Do you expect to volunteer:  
 Less than 25 hours per season  
 25 or more hours per season
- Do you prefer to volunteer:  
 A regular schedule each week (for example, Tuesday and Thursday afternoons)  
 Unscheduled; call ahead with volunteering dates  
 On a short-term project
- Please circle when you are available:    May-Oct.            Nov.-April            All year
- Please list any days of the week / times of day you are always unavailable:

## additional questions

- Why would you like to volunteer at Shelburne Museum?
- Do you have any special needs and/or requirements?
- Will you need Museum acknowledgement of your hours for United Way, a school, or another organization?
- Have you ever been convicted, imprisoned, been on probation, parole or under supervision as a result of a conviction, or been fined for any violation of the law? If “Yes” give dates, details, and penalties for each occurrence on an attached sheet of paper. An answer of “yes” to this question does not constitute an automatic bar on volunteering.
- Additional Comments:

I certify that answers given in this application are true and complete to the best of my knowledge. I authorize investigation of all statements contained herein and the reference listed above to give you any and all pertinent information they may have, personal or otherwise, and release all parties from liability for any damage that may result from furnishing same to you.

Signature \_\_\_\_\_ Date \_\_\_\_\_

shelburne museum p.o. box 10 shelburne, vt 05482  
 ph: (802) 985-3346 x3305 | fax: (802) 985-2331 | cwalsh@shelburnemuseum.org



# Smithsonian Institution Archives

## Volunteer Project Description

H:\BVP\FORMS\PROJECT

*Visitor Information and Associates' Reception Center*  
**BEHIND-THE-SCENES VOLUNTEER PROGRAM**  
*SIB T-238, MRC 010, (202)633-29877 phone/(202)786-2831 fax*

BTS # \_\_\_\_\_

### VOLUNTEER PROJECT DESCRIPTION

The information on this form will be recorded in the Behind-the-Scenes Volunteer Program database. Prospective volunteers will receive a copy of this description only when their interests match the description of tasks and their qualifications match the required skills listed on this form. Please keep in mind that your description will be competing with hundreds of other Smithsonian volunteer descriptions. The more you can make yours stand out, the more likely you will get a volunteer referral. For suggestions on how to write an attention getting project, please call the Behind-the-Scenes Volunteer Program staff.

**ALL FIELDS BELOW ARE REQUIRED! Incomplete forms will not be processed**

**BUREAU or MUSEUM** \_ Smithsonian Institution Archives \_\_\_\_\_

**Department or** \_Capital Gallery\_\_\_\_\_ **Room** \_\_3000\_\_\_\_\_ **MRC** \_\_507\_\_

**BRIEF MISSION OF YOUR BUREAU, MUSEUM OR DEPARTMENT:**

Volunteer Supervisor \_Tammy Peters\_\_\_\_\_ Phone \_633-5926\_\_\_\_\_

SI E-mail Address \_\_peterst@si.edu\_\_\_\_\_ FAX \_\_633-5927\_\_\_\_\_

**DESCRIPTION OF VOLUNTEER TASKS** (include location of work and accessibility considerations):

Working at the SIA Capital Gallery offices, the volunteer will assist the Archives Division with arrangement and description, minimal processing, and other archival tasks on collections.

**REQUIRED SKILLS, EXPERIENCE or EDUCATION:**

B.A. degree, some archival experience.

Number of Volunteers Needed: \_\_1\_\_\_\_\_ Minimum hrs/week/volunteer: \_\_10\_\_\_\_\_

Project Duration: Start Date 5/21/2009 End Date \_\_\_\_\_ or Indefinite X\_\_\_\_\_

\*Can this project use short-term, time-concentrated assistance (e.g., one volunteer who can work for two 30-hour weeks)? **Yes**\_\_\_ **No**\_X\_

\*Is the project suitable for mature high school students? **Yes** \_\_\_ **No**\_X\_

\*Do you have an urgent need for volunteer help? **Yes**\_\_\_ **No**\_X\_

\*In the interest of speed, do you give permission to have BVP staff release your name and contact information to any applicant who has been interviewed, screened and deemed appropriate for this project PRIOR to your review of the application? **Yes**\_\_\_ **No**\_X\_

**Name(s) of any volunteer(s) to whom this project applies:**

*We recommend that you read the **Handbook for Volunteers Working Behind-the-Scenes** to become familiar with program guidelines. Please call 633-2987 if you would like a copy of this handbook.*

# Additional Resources

## Online Resources

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### Charity Village

<http://www.charityvillage.com/>

Charity Village is “Canada’s online community for nonprofit and like-minded professionals—connecting them to ideas, opportunities, and each other.” The website includes topics such as fundraising, management, and volunteer engagement as well as directories of events, funders, organizations, suppliers, and volunteers.

### Energize, Inc.

[www.energizeinc.com](http://www.energizeinc.com)

The website for Energize, Inc., is rich in resources for volunteer leaders and volunteer managers. The website offers a free monthly e-newsletter to stay connected, a blog, “News in the Volunteer Field,” as well as a bookstore and training opportunities.

### Idealist.org, “Volunteer Management Resource Center”

<http://www.idealist.org/info/VolunteerMgmt/Developing>

Idealist’s website offers a comprehensive, step-by-step guide for how to develop a volunteer program.

### National Service Resources

<http://www.nationalserviceresources.org/volunteer-member-staff-management/evaluation>

National Service Resources’ website includes topics such as volunteer and staff management; program, financial, and grant management; and resources for specific groups, such as veterans and tribal services.

### Points of Light

<http://www.pointsoflight.org/>

Points of Light’s HandsOn Network has diverse offerings, including

training resources, links to articles on volunteerism, and many articles on volunteer management.

### VolunteerMatch

<http://www.volunteermatch.org/>

VolunteerMatch can help volunteer program administrators in several ways. Organizations may use the site as a recruitment tool by posting volunteer opportunities. Volunteermatch.org also offers a host of volunteer management resources and training modules.

### VolunteerToday

<http://www.volunteertoday.com/default.htm>

VolunteerToday features topics such as volunteer program evaluation, training volunteers and professional development, volunteer programs in the federal government, health care volunteer programs, as well as Internet resources.

## Print Resources

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Lee, Jarene Frances with Julia M. Catagnus, *What We Learned (the Hard Way) about Supervising Volunteers: An Action Guide for Making Your Job Easier*, The Collective Wisdom Series from the Field of Volunteerism, Susan J. Ellis, editor, Philadelphia: Energize, Inc., 1999.

Little, Helen, *Volunteers: How to Get Them, How to Keep Them (An Essential Guide for Volunteer Leaders and Staff of Professional, Trade and Charitable Nonprofit Organizations)*, Naperville, IL: Panacea Press, Inc., 1999.

McCurley, Steve and Sue Vineyard, *Handling Problem Volunteers*, Darien, IL: Heritage Arts Publishing, 1998.

Wittich, Bill, *Model Volunteer Handbook*, Fullerton, CA: Knowledge Transfer Publishing, 2003.