

# Museum of Vertebrate Zoology Archives Processing Plan Template

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Adapted from the UCLA Library special Collections CPRT training material.

**Processor Name:**

**Date:**

Before you processing a collection, you will create a processing plan that will help you to clearly plan for the collection arrangement and description. This work plan can be completed during the initial research and survey phase of processing, and can be thought of as iterative. Things like the series arrangement or collection dates may change during processing. However, any substantial changes made to the work plan should be discussed with the Archivist first.

PLEASE DELETE THE INFORMATION IN BRACKETS AFTER YOU'VE COMPLETED THE TEMPLATE!

## **COLLECTION OVERVIEW**

The following information should be formatted according to DACS. [http://files.archivists.org/pubs/DACS2E-2013\\_v0315.pdf](http://files.archivists.org/pubs/DACS2E-2013_v0315.pdf)

**Collection Number:** [Will be supplied by the Archivist and can be referenced in ArchivesSpace]

**Creator(s):** [Name of person or organization responsible for the creation, accumulation, or assembly of the described materials]

**Title:** [Collection Title, e.g. Joseph Grinnell papers, MVZ Operation records]

**Date span:** [Estimate date span of collection in years]

**Extent:** [list number of boxes in the collection and what type of box, e.g., 36 record cartons, 15 document boxes, 33 shoe boxes]

**Acquisition information:** [Provide any information on donor or how collection was acquired]

**Brief description of collection:** [One or two sentences about creator and types of records]

**Potential research value:** [Is it High, Medium, or Low?]

**Reason?** [Base your reasoning on uniqueness of material, dates of collection, significance of creator, historical value, etc. Use your best judgment and try to be objective!]

## **ARRANGEMENT**

**Proposed level of arrangement and description:** [Choose *collection level*, *box level*, *folder level*, or *item level*.]

**Proposed arrangement plan:** [List the proposed series (and subseries if necessary), the number of boxes that fit each series, and how that series will be arranged. If series aren't necessary, please explain why. Remember, to keep it simple and easy to follow!]

*Example:*

*Series 1: Correspondence (10 boxes, alphabetical by correspondent)*

*Series 2: Public Relations (7 boxes, chronological by date)*  
*Subseries 2.1: Anniversary Galas*  
*Subseries 2.2: Press Releases*

**Reason for proposed arrangement:** [Write a sentence or two on the overall arrangement scheme and why this arrangement is appropriate for the collection. Please note if original order exists. How does that factor into your arrangement scheme? Also note if you are reprocessing an already processed collection or processing an addition.]

## **PROCESSING CONSIDERATIONS**

### **Weeding and Appraisal:**

[Indicate if portions of the collection are candidates for weeding (extensive duplicates, tax documents, receipts, etc) or for separation (materials that are out of the scope of the collection). Make sure to note the boxes where they are located in your survey inventory!]

**Is there any material in the collection that should potentially be restricted due to privacy issues? If so, please indicate:** [This may include personnel records, SS#s, medical records, etc.]

### **Which of the following actions is necessary for preservation purposes during processing?**

[Choose from list and delete the rest]

Reboxing

Folding loose material or refolding

Flattening rolled or curled items

Hardware removal such as rusty fasteners

Removal from binders or loose leaf notebooks

Oversize materials or odd size items that need special housing: (list here)

Sleeving photographs in protective casing

Other preservation issues such as mold, red rot, excessive dirt or dust: (list here)

### **Estimation of supplies needed:**

[Choose from list and delete the rest]

Boxes (letter or legal) and amount needed:  
Amount of folders needed (~25 per box):  
Envelopes for photographs  
Slide sleeves/boxes  
Plasti-clips  
Other:

## **A note about field notes**

Many MVZ collections consist only of field notes. Sometimes there are field notes bound in the standard MVZ blue buckram. These field notes were originally taken in binders and later bound. These are commonly referred to as “Standard field notes.” Some field notes predate the MVZ, or were taken by non-MVZ personnel, or were simply taken in bound notebooks. These field notes are referred to as “Non-standard field notes.” To make things more problematic, many authors have both “standard” and “non standard” field notes. This will need to be reflected in the finding aid through appropriate series.

### **MVZ standard field notes and non standard**

A checklist:

Are there field notes?

Are they bound “standard” field notes?

Are there also “non standard” field notes?

If you answered yes to any of these questions, you will need a series titled

Field Notes

Field notes are described at the item level and require special cataloging. The Archivist will review specialized data entry for field notes.