

Chapter 4.2 Video Transcript What You Need to Know: ORGANIZING YOUR COLLECTION

In Chapter 2, we talked about doing a first pass and a second pass through your collection. The first pass was for the purpose of familiarizing yourself with what was in your collection or what was being donated, making sure anything physical was in decent condition, and ensuring that you could open and read all digital files. The second pass, that you'll do in this chapter, is to get the material into its permanent archival storage and get it organized and labeled. There are three parts we'll talk about: 1) **sorting through your material** to determine what categories of material you have, and 2) **labeling the material** in your collection. Your main goal with these two parts is to make things as easy to find in your collection as possible. 3) The third part is **getting material into its permanent storage**, and your main goal here is to preserve it carefully so it can last far into the future.

Sorting Through Your Material

Our first recommendation is to create a number of categories that define what the obvious groups of material are in your collection. For example, imagine you've taken everything in your collection and dumped it out onto the floor in front of you. As you scan through everything that's there, where do your eyes go? What jumps out at you?

Maybe you notice different **types** of formats of material. For instance, do you have a big collection of photos? or video? Do you have an amazing collection of kits or costumes that have been worn over the years? Do you have a small library of documents including songs, lyrics and sheet music? Maybe what makes most sense to you is to organize it into different types of material that you have.

Or do you look at the pile on your floor and see material for songs, material for dances, administrative records of your organization and publicity material? Maybe what makes most sense to you is organizing it based on the **content** of your collection.

It doesn't matter which of those directions you take; the key thing is to ask yourself the questions: "What would make it easy for people to find things in this collection? What will people want to look for?" If you know that people will be really interested in searching through photos, then you might want "Photos" or "Images" to be one of your categories. Or if you know that people might want to find examples of songs from a certain date, then maybe "Songs" is one of your categories, perhaps organized chronologically. The most important thing

to keep in mind in choosing your categories is how to make finding things as clear as possible, given what you anticipate people will want to find in your collection.

As you choose your categories, here are five key guidelines we'd like to offer:

1. The **categories need to be clear** to you and to any of the users of your collection. For the most part, anyone looking at the title of your categories should have a pretty clear sense of what they are just from the title.
2. Which leads to another key rule: **“Miscellaneous” is not allowed**. It's too ambiguous and doesn't help anyone who is using your collection.
3. Any item in your collection **should clearly fit in one of the categories** and not in any of the others. (We'll show some examples at the end of this video.)
4. The categories **should encompass everything in your collection**; nothing should be “left out” at the end.
5. Typically, it's **considered best practice to have around 3-6 categories** at most. Fewer than three can result in categories that are too broad, and more than six results in categories that start to become too narrow. There's a “just-right” balance you want to try to strike that balances the time it will take to organize all the material and the ease of finding things once they're organized.

For organizations that may not have very much material, you might consider just setting up three categories, such as:

- Visual Images (this can include photos, slides, video, artwork, etc.)
- Documents
- Ephemera (physical "stuff" such as costumes, kits, buttons, souvenirs, etc.)

For organizations that may have more material, or that have one particular type of thing, such as photos and video, that is much larger than other parts of your collection, you might consider breaking it down into a little more detail, such as:

- Photos and Slides
- Video
- Documents
- Ephemera

If your collection has a lot of physical documents in it, you might want to specify some document categories that provide more guidance about what they're about, such as:

- Correspondence
- Administrative minutes and notes
- Publicity material

and then keep broader categories for your other types of material:

- Ephemera
- Visual Images

The choices are up to you; you can establish whatever categories make the most sense for your collection—as long as they are clear to any users of your collection.

Notice that the category titles could indicate the **FORMAT** of the items in it, such as Ephemera or Visual Images. Category titles could also indicate the **CONTENT** of the category, such as Correspondence, Administrative Minutes and Notes, or Publicity Materials. You can use both **FORMAT** and **CONTENT** categories in the same collection—as long as it's clear where any particular item in the collection belongs.

We've created several different examples to give you an opportunity to practice describing categories, then comparing your thinking to what we would do. Those examples are included at the end of this video; if that sounds useful to you, please take a look. If not, you're welcome to skip that part at the end of this video.

Labeling Your Materials

The kinds of labeling you decide to use depend once again on your particular situation and your personal preferences. We'd like to offer suggestions for two different types of labels.

The first type of label is a **keyword**. We strongly recommend that you do *some* sort of keyword labeling because it's such a ubiquitous way to search for material. We'll get into keyword labeling in the next chapter.

The second type of label is an **identification number**. We'll talk about it here, because—if you decide to do this—then labeling items with an identification number is something you'll want to do now as you're getting your material into permanent storage.

Assigning an ID number is not necessarily something that everyone would choose, so why might you decide to do this? There are certainly trade-offs. The advantage to doing this is that it makes items in your collection much easier to find. For example, if someone is looking for a

particular set of photos from 1980 or a special one-of-a-kind document, then being able to pinpoint precisely which ones they need can be made much easier with an ID number, as opposed to having to comb through many digital or physical photos or having to search through a folder of many documents. The downside is that it can take a lot of time to do the necessary labeling. You can reduce the amount of time by choosing to only label individual items that you think will be in demand in your collection and then grouping other material into folders and labeling each folder rather than each item. But again, it's a trade-off between the time you have to put into this and how easily you want people to be able to access your material; you'll have to decide what works for your situation.

What kind of identification number should you put on an item? You can make up any kind of numbering system you want for your items; the numbers do not have to be complicated or long. You could, in fact, just number them 1 - 999. In our experience, we chose identification numbers that had the year of creation (if we knew it), followed by a sequential number. If we didn't know the creation year, we just used xxxx-.

If you think you might like to use identification numbers with archival material, we've added some additional information at the end of this video that we recommend you watch. If you're not going to use ID numbers, you can skip that part.

Getting Your Materials into Permanent Storage for Preservation

At this point in time, your material is in its temporary storage, so last of all, we'll talk about getting it into its *permanent storage*. We'll describe the best possible option, as well as some good-enough options if "best" isn't manageable.

What do you do with paper documents?

Paper can yellow and get brittle over time, so getting any paper documents into special archival, acid-free folders is best. There are several great sources for archival supplies:

- Gaylord Archival
- University Products
- Hollinger Metal-Edge

We've provided the URLs to each of these companies in the Resources PDF for this chapter. However, as wonderful as they are, archival materials are not cheap. If you cannot afford acid-free folders, then regular file folders are a "pretty-good" option. You can also choose to buy a small supply of acid-free folders for your highest priority materials and then use regular file folders for the rest of your material.

Keep in mind that newspaper will cause other paper it touches to yellow over time, so now is the time to decide—if you haven't already—about whether you're going to keep physical copies of clippings or scan them and just keep the digital copy. If you keep the originals, separate them out and relegate them to their own folders.

What do you do with physical photos or slides?

Best options include getting plastic sleeves for any photos that you feel need individual attention, such as a particularly fragile one or one that you deem to be especially valuable. Slides can be stored as a best option in slide pages with individual pockets for each slide. Again, these supplies can be pricey, so maybe consider buying a few for those particularly special photos, or ones that may be aging and need some special preservation. If you're shopping with archival supply companies, look for polypropylene or polyester photo sleeves.

A “pretty-good” option is to put photos into a folder, and if possible, place a piece of acid-free tissue paper between them. Make sure your photos have no residual adhesive material on them that would cause them to stick to other photos in the folder. A “pretty-good” option for slides is to store them in a small plastic slide case or box.

What do you do with physical video or audio cassettes?

Best options include storing each video or audio cassette in its own individual case to protect from dust, damage, and humidity. There are special acid-free archival boxes that fit video cassettes, and special boxes sized to fit two rows of audio cassettes. For a pretty-good option, use conventional plastic cases.

Keep in mind that the tape typically used for video- and audio-cassette tapes is not very stable over the long term and will start to degrade over time. You may want to consider digitizing any video or audio cassettes that you receive or seek out help from people who do this professionally. Sometimes a tape will break in the process of digitizing it, so you may only have one chance to capture it; for particularly valuable tape, working with folks who are prepared for this can help ensure that you're successful.

What do you do with ephemera, a fancy archival word for physical objects?

Best options include finding an archival box that is sized appropriately for whatever you're trying to store. Having enough room to fit the item or items in the box but without a lot of extra remaining space is ideal. If you do have extra space around the item or items, then fill it in with archival tissue paper.

A pretty-good option is to find a solid box with sides and a lid that will not collapse easily, and to wrap the items in tissue paper to protect them from dust or damage. Most of all, you don't want the items to be able to move around inside the box, so add some packing material if you need to, to keep it from sliding around.

Lastly, what do you do with digital files?

The best option for any of your digital files—interviews, photos, video, documents or other scans—is to choose the appropriate file format for long-term preservation. You can review the chart of these file formats in the Resources PDF for this chapter. Then establish your file-naming practices and be consistent! As we've said before, make sure you have back-ups stored ideally in three different locations.

A pretty-good option is to have files saved in whatever format is readable for you. You can refer to the chart of file formats to see other acceptable formats that may not be the best but are quite usable.

=====

Before moving on, if you'd like to try some guided practice examples for creating organizational categories, those come next. Or you can get some important tips for labeling with identification numbers. If neither of those are of interest to you, you can move on to the final Chapter 4 video, *Using the Spreadsheet*, to start to enter information about your materials into Tab 3.

Examples for Practice

Example #1: A Morris team has a collection of photographs and short video clips, both physical and digital, some annual meeting notes from over the years, some random bits of team kit and some documents, again both physical and digital, either providing information about dance-out events or address lists of who was on the team. What categories do they need?

- Since the team has both photographs *and* video, it might make sense to group those together under the broader heading of “Images” or “Still Images and Moving Images”.
- The random bits of team kit are clearly a separate category, so they could be put in a category of “Ephemera” or “Clothing”. Ephemera might be preferable to “clothing,” since it is more general and would allow you to include any other physical items that might get donated, such as name buttons, special pins, or other souvenirs of dance-out events.

- Both the annual meeting notes and other documents are all “documents,” so you could use that as a category. Should you separate them into two categories of “annual meeting notes” and “other documents?” That’s up to you. If there is a lot of material in each group, then it might make sense to divide them up. If not, they are probably best left as one category.

Upshot: This collection could have three categories—Images / Ephemera / Documents—or it could have four categories—Images / Ephemera / Administrative Materials / Documents, with the understanding that anything administrative goes there, even if it is a document. It’s OK to define a particular category in the way you want, as this example does with documents—any document that is not administrative materials—as long as you have information for your users that lets them know that’s how you’ve defined it. We’ll talk about how to do that in the next chapter on making your collection available.

Example #2: A dance organization has collected interviews of older members of its community, and is starting to collect interviews with younger, newer members. People have donated photographs, photo albums, and digital photos. Someone else donated their slide collection from a special event. People have donated flyers for various events, as well as programs for various dances showing what dances were done and who the music staff were. Other people have donated posters advertising some of the events. What categories do they need?

If you’d like to practice figuring out the categories for this collection, you can pause the video here and decide what categories you would come up with. Then continue to hear what we came up with, and why.

- The interviews appear to be a central part of this collection and an easy category to define. So, one category is “Interviews”.
- The photos, photo albums, and slides are all types of images and again, an easy category to define. So, another category is “Images” or “Still Images”, to indicate that there is no video. Your choice.
- The flyers, posters, and programs are all documents so you could choose to use “Documents” as a category, grouping them as similar formats. Alternatively, you could look at the content and say to yourself: “The flyers and posters are both promotional materials, but the programs are not.”

So, you might decide to create a category of “Promotional Material” and another category of “Documents” or simply “Programs”. Going with the more general “Documents” would allow you to group other documents that come into the collection in the same category, so might be

preferable over “Programs.” However, if you have a large collection of programs and know that they would be of particular interest to users of your collection, you could choose to go with “Programs”.

Upshot: This collection could have any of one of the following combinations: Interviews / Images / Documents–or–Interviews / Images / Promotional Material / Documents–OR–Interviews / Images / Promotional Material / Programs.

Example #3: In creating the Marlboro Morris Ale Collection, we had a wide variety of material in our collection. We had both physical and digital photos, we had a large physical slide collection, and we had a bunch of videos again both physical and digital. We had a large collection of interviews, a large collection of administrative records from the organizing committee including a bunch of information about who attended and what years. We had posters, flyers, program books, magazine articles, newspaper clippings. We had a large collection of Ale t-shirts, name buttons for many of the years including some souvenirs from visiting teams. We have essays that people wrote, letters, correspondence, speeches and a bunch of material not necessarily about the Ale but about the history of the founding team. Whew! It was a lot!

If you’d like to practice figuring out the categories for this collection, you can pause the video here and decide what categories you would come up with. Then continue to hear what we came up with, and why.

Here’s what we did:

- The interviews were, for us, a central part of this collection and an easy category to define. So, one category was “Interviews”.
- We had a wide variety of written material—essays, letters, speeches, and written reminiscences. We decided to lump all those together in a category that we called “Correspondence and Writings”.
- Many of the administrative records were also handwritten in the early years, later shifted to digital formats. Because there was a lot of it, and it had a very coherent purpose—it was all about the organization of the event—we made a category called “Administrative Records” that included anything about the organization of the event, first by the team that founded it, and later by the organizing committee that took over from the team.
- We lumped all the photos, video and slides—both physical and digital—into “Images”.

- We decided to gather together everything that had been printed for promotional use or had been published in some other format and called it “Printed Materials and Clippings”. This included posters, flyers, newspaper clippings, press releases, and published magazine articles.
- All of the t-shirts, name buttons, and souvenirs went into our “Ephemera” category.
- What was left over? The material about the history of the founding team. It wasn’t really about the Marlboro Ale, but the Ale *was* founded by the team, so it seemed too important to leave out of the collection. So, we chose to make an additional category simply called “Related Material”. We wanted a separate category to indicate that this material was NOT about the Ale itself but would be of interest to anyone looking at this collection, and we listed it as the last category because it was more peripheral to the collection.

So, in the end, we had seven categories, shown here.

Again, notice that we had some categories that were about content, like “Interviews”, Administrative Records or Related Material, while others were about format, like Images or Printed Materials and Clippings. That’s not a problem as long as you have a clear and obvious category for any item in your collection.

INFO ABOUT USING ID NUMBERS

If you decide to label your items with an identification number, here are some guidelines on how you can do that:

For Physical Items

Because you are trying to preserve an item in its original state:

- Don’t use ink; use pencil. Ink can bleed and smear on valuable original materials.
- If you’re writing right on the item, such as on a document or photo, pick an unobtrusive place to write the number. Some people choose to write the number on the back and in a bottom or top corner.
- If you can’t easily write on the item in pencil, such as on a piece of clothing, or artwork, or a name button, then write the ID number on a tag and attach the tag to the item.
- If items are in a folder, you can write the number somewhere on the folder in an easy-to-find location.
- Whatever you choose, be consistent so that any users of your collection will understand where to look.

For Digital Items:

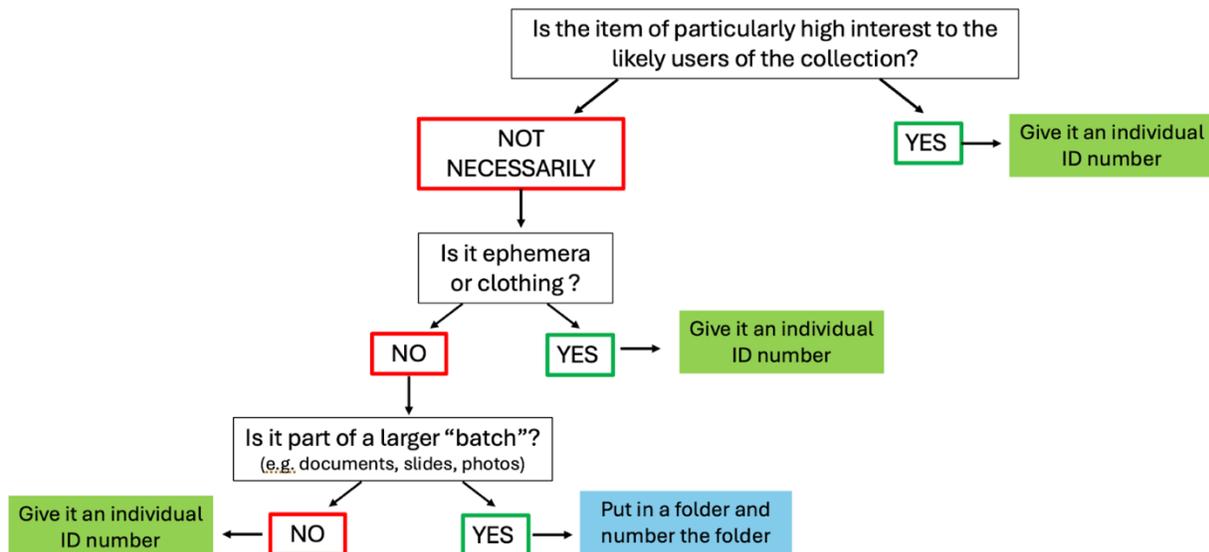
For digital items, the ID number belongs in the file name, so let's talk for a moment about file-naming guidelines. You can create whatever file-naming structure makes the most sense for your items, but consider the following two recommendations:

- Include the ID number in the file name AND...
- The file name does not have to fully describe the item; you can do that in a title for the item if you put it on a website.

Here are several examples from our collection with the item title we gave it in the left-hand column and the corresponding file name in the right-hand column. This is just to show that the file name does not need to match the item title and can be simpler -- which is sometimes easier when you're dealing with a lot of files.

What should get a number? Your decision here will have implications for how you store your materials. For example, let's say you have a pile of photos from your 1993 dance season. Do you need to give *every single photo* a number? The answer is....it depends! The grain size you choose to label in your collection is entirely up to you and is again about striking a balance between how much time you and your team have to create this list, and how easily you want users to be able to find things. It will be a compromise on both sides.

In our experience, the decision tree we used to decide what to label went something like this:



- First, we looked at the question "Is the item of particularly high interest to the likely users of the collection?" If we thought Yes, then we gave it an individual ID number. If we thought No, Not Necessarily, then we asked:

- "Is it ephemera or clothing?" If it was, then we gave it an individual ID number. If not, we next thought about:
- "Is it part of a larger batch of something, like documents or slides or photos?" If Yes, then we thought "Put it in a folder and we'll give the folder a number". If not, then we gave it an individual ID number.

So, the choice is totally up to you, based on how much time you have to organize your collection, what materials you have for storing your items, and how popular you think different items in your collection will be.