USING MINIMUM STANDARDS PROCESSING TECHNIQUES
for the LABOR BACKLOG

Goal: *To make collections available for research as quickly as possible while recovering space in Alumni Hall*

- Prepare selected collections for basic research access, preserving the original order
- Weed records (duplicates, financial, etc.) that do not have permanent value
- Remove materials that can be transferred to other Southern Labor Archives collections (periodicals, books, conference proceedings)
- Re-folder and re-box files if necessary; make sure all boxes are full
- Number and label the new folders

After completing a collection, we will be able to:
- Create EAD finding aid for each collection (historical sketch, scope and content note, date ranges, restrictions, citation, inventory based on folder labels, etc.)
- Archivist will create MARC record for collection
- Accumulate discarded materials and prepare them for destruction
- Add transferred materials to appropriate SLA collections

What's *not* part of this minimum standards processing project:
- Arranging or re-arranging folders into any particular order
- Arranging materials inside of folders into any particular order
- Preservation photocopying (with the exception of egregious examples of very acidic paper or mold infestation)
- Holdings maintenance/preservation: removing staples, paper clips, binder clips – the only thing to quickly remove if you find it is rubber bands
- Blacking out of any information – archivist will deal with security/privacy issues
- Removing audio-visual materials and housing them in separate boxes, using removal slips
- Creating a series description for each series (this would be optional, time permitting, but shouldn't hold up the finding aid; consult with archivist)

It is likely that no inventories exist for unprocessed materials.

Minimum standards processing:

1. Spend 1 to 2 hours (or less, ideally) per box, without comprising accuracy, neatness or confidentiality. Approximately 30 minutes should be spent on refoldering (refolder only when necessary) and the remainder of the time should be spent determining accurate folder descriptions if current descriptions are inaccurate or insufficient (see #4).

There may be an occasional collection that will not require refoldering.

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2. Don't worry about arranging materials inside folders. Arrangement is considerably less important than description (see #4). However, do check documents in folders for an approximate date range if one is not included with the folder title.

3. Re-folder into stamped folders; number folders; label folders with box and folder number, folder title/description

4. **Create intelligent/coherent folder descriptions** – after all boxes have been weeded and attended to, someone will do a box list. Because there is minimum intellectual AND physical arrangement of these files, the searchable folder description becomes all the more important. **Folder descriptions need to be consistent and thorough.** Folders will often be labeled accurately, but when they aren't**,** review the material inside the folder and create a more accurate description.
   - A folder labeled with the year 1978 may include newsclippings and press releases. A more descriptive title would be "Publicity, 1978" or "Newsclippings and Press Releases, 1978"
   - If a folder labeled "Boy Scouts" contains correspondence, a more descriptive title would be "Boy Scouts of America, Unit 122, Columbia, South Carolina, Correspondence, 1985-1992"

Further, if the folder descriptions aren't thorough enough, or if the box contains exceptional documents, spend a few minutes writing a short paragraph about the contents of the box. This shouldn't be a regular occurrence, but it may be necessary from time to time.

5. Manage discards and transfers efficiently. Create and follow a schedule for gathering de-accessioned materials and placing them in the Annex. Alert archivist about materials to be transferred. Archivist will review all discards and transfers.

6. Label completed boxes with temporary labels. Include a brief description of the types of documents in the box.

7. Before returning box to shelf, type up the folder labels, including box and folder numbers, into an EAD document.

8. **Stay on top of shelf space**. Review and re-assess throughout the project the available shelf space in Alumni Hall. Constantly monitor and stay on top of where in the stacks the boxes will go. **Boxes should either be in the processing area on the table or on a shelf.**

9. Improve workflow as you go – if you try one way, but then think of a better way as you move through boxes, go for it.

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What to weed out:
- Bank statements
- Cancelled checks
- Travel vouchers and expense reports
- Receipts (purchases, credit card, deposit)
- Supporting documentation/files for transactions
- Payroll ledgers
- Purchase orders and bids
- Accounts receivable ledgers
- Time cards/attendance records
- Sick time/Annual leave requests
- Wage and Income Tax returns
- Annual W-2, 1099 or individual tax documents (do NOT throw out incorporation documents such as verification of tax status)
- Budget entries (not annual budget reports)
- Record of employee deductions/contributions, related info
- Grant files (if the term of the grant/contract is complete)
- Insurance records older than 3 years
- Investment records older than 3 years
- Invoices
- Contracts
- Duplicate checks
- Retirement system files
- Paid permits
- Building and renovation contracts (if life of building/project has expired)
- Workmen's Comp records (claims, invoices, reports) if case has been closed 5 years or more
- Unemployment insurance, if case has been closed 5 years or more

What to keep and process:
- Annual budget reports
- Annual audit reports
- Pledges, gifts, planned giving and other donor-related documentation
- Capital project building and renovation records, including contracts (if life of building/project still on)
- Membership applications (dues receipts should be weeded out)—if SS numbers exist, files may be restricted or numbers blacked out
- 501(c)3 tax status information—Incorporation records
- Correspondence
- Annual reports

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- By-laws
- Meeting Minutes
- Contracts/Contract Negotiations
- Grievances
- Agreements
- Arbitration

What to flag for restriction (consult with archivist):
- Social Security Numbers
- Sensitive/Personal Information
- Membership files
- Grievance records

In addition:
- Weed out duplicates, office supply manuals/catalogs, letterhead/envelopes – *we only keep three of any one thing, and we don't want to keep anything not related to labor*
- Binders: don't spend a lot of time on it, but remove all binder contents and place into folders – throw out binders, after transferring information onto folder description
- Dealing with artifacts:
  - If the artifact seems to be part of a group of materials in a box:
    - And is small, find appropriate housing for within the box (e.g., a union button should be transferred into a labeled archival envelope, and then placed in a folder). Do not spend an extensive amount of time on this process.
    - And is large, use a removal slip to connect the separated artifact to the appropriate folder.
  - If the artifact is not part of a group of materials, remove from box and set aside to be placed with other stand-alone artifacts.
  - After all of the records have been processed, stand-alone artifacts can be boxed together and placed at the end of the collection.