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# ARCHIVAL DESCRIPTION GOOD, BETTER, BEST

There are many ways to add description to your collections, whether it is a finding aid, collection guide, inventory, or register. The important step is to have information about collections documented in some way. This descriptive information must be written down and preserved to promote a sustainable future for the important material that your TALM cares for and creates.

One can create descriptions at the collection level, series level, item level, and even a complete DACS compliant finding aid with nothing more than a simple word processing program like Word or OpenOffice. If you have a lot of information, especially at the item level, spreadsheet tools like Excel or database programs like Access or Filemaker Pro can be very helpful. Collection management software (e.g, ArchivesSpace, PastPerfect, CollectiveAccess) provide more sophisticated tools for internally documenting collections. All cultural heritage organizations should decide how to organize its descriptive information, both internally for staff and externally for users. For finding aids shared online, EAD encoded guides provide a means to present and retrieve information in a number of useful ways. Many institutions use a combination of these tools to maintain intellectual control over collections, and provide better understanding and access to staff and users.

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# GOOD ARCHIVAL DESCRIPTION

## CREATOR

The individual, family, or organization responsible for creating the collection. Oftentimes this means the person primarily responsible for bringing the collection together.

## COLLECTION TITLE

Each collection should have a title to help identify it.

Examples:     Jane Brown papers  
                  American Indian Movement records  
                  Brown family photographs  
                  John Brown collection of Edward Curtis photographs

## COLLECTION DATE

The date range within which the collection materials were created.

Examples:     1980-1985  
                  undated  
                  1980  
                  1945-2013 [bulk 1991-2013]

## COLLECTION NUMBER

Each collection should have a number unique within the repository. There are many ways to create collection numbers. One simple way to number collections is according to the year acquired. For example, collection 2015.01 may be used to identify the first collection acquired in 2015.

In many institutions, prefixes are used to help staff distinguish between different types of collections that are often shelved separately.

For example, at Washington State University, there are 5 different designations:

- UA for records created by the University
- WSU for published materials created by the University
- Cage for manuscript collections
- PC for photographic collections
- MS for unprocessed collections

## COLLECTION SIZE

There are a number of ways to measure the size of collection: volume, number of containers, amount of shelf space a collection occupies, number of total items or computer files. Whatever metric(s) you choose is fine as long as it is applied consistently and easy to understand.

## CONTENT DESCRIPTION

A summary of the materials in the collection. It's useful to start with a broad overview of the subject of the collection and the type of materials it contains. Subsequent sentences can include more specific details relating material types to specific topics, activities, or events. It is also useful to highlight notable documents within the collection. You should also mention specific formats here to help users identify materials that may require special equipment or more time to view. This is particularly relevant for audiovisual and digital materials. Finally, if there are any surprising gaps in the collection, make sure to include these as materials that cannot be found in the collection.

Example:

The collection consists of correspondence and other manuscripts, notebooks, legal and financial documents, a small number of photographs, and memorabilia, including printed ephemera. Most of the material is related to Vincent and Emma Higgins, Belle Higgins Rucker, and Delbert Rucker, with a small amount related to Ellen Chandler Higgins and Suzanne Rucker.

## REPOSITORY INFORMATION

Information about where to go or who to call to view the collection. For finding aids posted online, this is vitally important.

## CONDITIONS OF USE

Information about whether the collection is open for use and how materials may be used. This is often broken up into two fields, one about what can and can't be viewed and the second about conditions for sharing the information from the collection through research, art, and other forms of communication.

When creating information for access, it is important to state any restrictions on viewing materials and the conditions under which any restricted materials may be viewed. Is the permission of the donor required to view all or part of the collection? If some or all of the collection is restricted, is this restriction for everybody, or is access dependent upon affiliation with an organization or community? When do restrictions end, if at all?

Examples:     This collection is open for use.  
                  Much of this collection is open for use. The case files are restricted until 2070.  
                  This collection is available for use by enrolled members of the Yakama Nation.  
                  Access by others must be approved by the board of trustees.

Even if a collection is open for the public to view, there may still be restrictions on how the materials may be used. For example, materials under copyright cannot be used in publications without the publisher performing a good-faith search for the copyright holder and permission, if the copyright holder is known.

Example:  
Copyright restrictions apply. The donor has transferred non-exclusive rights to Washington State University Libraries. The Libraries may grant permission to quote or publish materials in the collection created by the donor.

## SUBJECTS

Terms form a controlled vocabulary used to relate the collection to other similar collections. Many institutions use headings or vocabularies established by external entities, such as the Library of Congress. However, a vocabulary created within a TALM may be useful since the terms will be specific to the community. As long as the terms are used consistently across collections, they can be a good way to put collections into categories.

## LANGUAGES

This is a statement about the languages that are found in the collection.

Example:     Materials are in English and Pomo.  
                  This collection contains no linguistic content.

## ACQUISITION INFORMATION

Who donated, sold, or transferred the collection to the institution and when. Also include information about who oversaw the transfer if a third party was involved.

Examples:  
The Jane Brown Papers were donated to the Washington State Libraries by Harold Brown in 1979.  
  
The Garfield Automotive Records were donated to the Washington State Libraries by Gus Green and delivered by Green's partner Joe Jacobs in 1985.

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# BETTER ARCHIVAL DESCRIPTION

An institution may improve its descriptive practices by including more detail about the collection as a whole and by providing finer levels of detail, such as series headings and descriptions and a collection inventory. Decisions about the level of description to provide should be decided on a collection-by-collection basis.

Additional collection level elements include:

## BIOGRAPHICAL OR HISTORICAL NOTE

This section details the history or biographical information relating to the collection and how it was created. It could also be titled Background Information or similar, a place to give context for the person or people who created the collection and the historical or cultural events that the collection covers.

## RELATED MATERIALS

List any collections that may be related to the collection in question. Related collections can be at your TALM or elsewhere. Relations could be based on subject matter, origin of the content, the creator, family or organization.

## SEPARATED MATERIALS

List anything that was taken out of the collection (separated or removed), explain why items were weeded or disposed, or where they were relocated to. Items may be separated for various reasons, including moving of special formats to more appropriate storage areas or departments; the outright destruction of unneeded copies or nonessential material; and the deliberate or unintentional scattering of parts of collections among different repositories.

## SERIES LEVEL DESCRIPTIONS

If there are series (sub-sections or groups) within the collection, each series should have the following items:

**Series number**

**Series title**

**Series date**

**Series size:** Approximate shelf space and/or number and type of containers.

**Series description:** A summary of the content of the series. A “scope and content” for the series.

**Any variations from collection level descriptions**

## FILE LEVEL DESCRIPTIONS

**File title**

**File date**

**File container(s)**

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# ARCHIVAL DESCRIPTION AT ITS BEST

In an ideal world, every archivist would have the time to describe every collection and item all the way to our “best” level recommendation. However, with many materials and many other responsibilities, this is just not realistic. In practice, the “Best” level of description depends on many factors within your institution including staff time, funding, technology, and balancing other priorities.

For this reason, your TALM’s goal should be to have ALL collections described at SOME level. Not all collections merit detailed description, and could have only the minimum description applied to them. Other collections, such as small photograph or artifact collections, might be unusable without extremely detailed item-level description. The important thing is to have collections be accessible to your audience, and to know when the fine-grain of description are necessary versus when a less detailed summary is sufficient for community members to find what they are looking for.

## CREATE DESCRIPTIONS ACCORDING TO WIDELY USED STANDARDS

Using a widely used and supported standard makes it easier to share, migrate, and aggregate information. For example, one may search the holdings of several archival institutions in California by using the Online Archive of California (OAC). This is possible because the member institutions that provide finding aids to the OAC use common standards, specifically, Describing Archives: A Content Standard (DACS) and Encoded Archival Description (EAD). This use of standards makes it easier for users to find collections across institutions. In addition, using standardized metadata makes it easier to implement archival management software designed to ingest finding aids written in EAD and other widely acknowledged standards.

Most metadata schemas, like EAD, use XML to break down information into specific categories. The benefit of XML is that it is very flexible, provided that an institution has the technical support to present the information in a user-friendly format. Basically, the XML document holds the information, which is translated by another document for display on the internet. See the following example.

## ITEM LEVEL DESCRIPTIONS

Creating item level descriptions allows one to find specific items within an entire collection. While item level descriptions create very long finding aids that can be difficult to browse, item level description has at least a couple of benefits. Materials described at the item level can be controlled individually. In some instances a grouping of materials may contain a single document that presents privacy concerns. If described at an item level, a repository can restrict the individual document in a fairly straightforward manner. Item level descriptions provide more information to help users locate an exact item. This is particularly useful when describing photographic materials and materials of particular note that many people will want to view.

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## OTHER USEFUL RESOURCES

***Arranging & Describing Archives and Manuscripts***, by Kathleen Roe (Society of American Archivists, 2005).

This book describes the basic principles behind the arrangement and description of archival collections.

***Describing Archives: A Content Standard (DACs)***, authored and published by the Society of American Archivists.

These rules are used by many American archival institutions to describe their collections. It is available online through the Society of American Archivists at:

<http://files.archivists.org/pubs/DACS2E-2013.pdf>

**“Item Level Description,”** from *Managing Photographic Records in the Government of Canada*, Library and Archives Canada.

This brief section describes the type of information useful in an item level description of a photograph. It is available online at:

[http://www.collectionscanada.gc.ca/government/002/007002-2048-e.html#two\\_item](http://www.collectionscanada.gc.ca/government/002/007002-2048-e.html#two_item)