#  [Collection Title]

## \*Creator

(Name of the person or group responsible for creating or collecting the materials in the collection)

## \*Date

Date range:

Bulk dates:

## \*Extent

Linear Feet: (How much shelf space does the collection take up)

Number of Containers: (How many boxes and/or folders)

Number of Items or Digital Files:

## Collection Summary

A description of the collection in three sentences or less.

## \*Languages

List languages used in the collection from most used language in collection to least used.

## Processing notes

Name of processor and date processed

# Collection Details

## Biographical / Historical Note

A brief history about the records creator. Facts that provide context to collection materials should be emphasized, as should information that will help readers identify records creators, such as birth and death dates, place of birth or location of organization, and any name changes or significant changes to the organization.

## Collection 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 ii 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.

## Arrangement Description

Describe the arrangement of the collection including series titles and file level arrangement, if any. If arrangement is at the collection level, you may omit or simply state, “This collection was processed at the collection-level.”

## Separated Materials

List materials that were acquired with the collection, retained by the institution, but not processed with the collection. For example, books that were cataloged separately or materials that were processed as a different collection.

## Related Materials

List other collections directly related to the collection. This may include other collections held by your institution or collections held at other institutions.

## Location of Originals

If the collection consists of copies of original documents (e.g., microfilm, printout of image scans), name the institution, group, or individual that holds the original.

## Immediate Source of Acquisition

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.

## Subject Headings

List subject headings from a controlled vocabulary or authority file. The Library of Congress Subject Headings, the Art and Architecture Thesaurus, and Thesaurus of Graphic Materials are commonly used vocabularies. You may also use a vocabulary created by your institution.

## Processing Note

Actions performed during processing that are not covered by your institution’s policies and procedures.

# Using the Collection

## Access Statement

State any restrictions to access based on privacy concerns, physical condition of collection materials, or technological barriers, such as lack of access to playback equipment.

If no restrictions, state “Collection is open and available for use.”

## Rights statement

State whether copyright has been transferred to your institution. If no transfer has occurred, use a boilerplate statement, such as, “Copyright restrictions apply.”

Copyright has been assigned to [NAME OF INSTITUTION] by [NAME OF DONOR]. For permission to publish materials created by the donor, [PROVIDE INSTRUCTIONS ON WHERE TO GO FOR MORE INFO]. Materials not created by [NAME OF DONOR] may still be under copyright.

OR

Copyright has not been assigned to [NAME OF INSTITUTION]. Copyright restrictions apply.

## Preferred Citation

[ITEM DESCRIPTION], [COLLECTION TITLE AND DATE]

[NAME OF INSTITUTION] [CITY, STATE]

# Collection Inventory

### Series 1: Series title, dates

This is a series level scope and content note. Here you provide more detailed information than the Collection Description field. If there are related materials in other series, you may want to note that here.

#### Subseries 1: Subseries title, dates

A scope and content note at the subseries level.

***Repeat Series and Subseries format as needed. If an item is in an enclosure other than a box and folder, that is OK, just specify the container type (e.g., Case 1, Drawer 1).***

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