

**Caring for Collections: Developing National Best Practices for Archival Accessioning**  
NLG Implementation grant // **Organization:** Beinecke Rare Book & Manuscript Library, Yale University

**Summary**

The Beinecke Rare Book and Manuscript Library at Yale University seeks an Implementation Grant in the amount of **\$245,791** to support the collaborative development of comprehensive best practices for archival accessioning.

**Project Justification**

The reality of archival accessioning is not accurately captured by its traditional definition: taking physical, legal, and intellectual custody of newly acquired materials in archives and special collections repositories. In progressive, contemporary practice, accessioning is a rich and varied hybrid of many discrete duties encompassing a wide spectrum of pre- and post-custodial work, including 1) selection, acquisition, and appraisal, 2) arrangement and description, 3) stabilization, storage, and preservation, 3) labor, ethics, relationships, and the work environment, and 4) born digital accessioning and preservation. Effective accessioning procedures enable foundational description, stabilization, and relationship building that is integral to managing collections ethically throughout their life cycles, avoiding duplication of effort and establishing meaningful connections with creators and communities. Currently, there are no profession-wide best practices for accessioning in the United States. Individuals performing this work often find themselves isolated and under-resourced, combatting misunderstanding of the necessity and complexity of their duties. To that end, we request financial support from IMLS to energize a community-driven effort to develop national best practices for archival accessioning. Our working group includes engaged individuals, performing and managing many forms of accessioning labor, who can bring the types of extensive, hands-on expertise needed to write specific yet flexible guidelines that can be made freely accessible for widespread usage by any individual and organization stewarding digital and physical special collections materials. Since accessioning labor is historically under-examined in archival scholarship and underrepresented within our professional organizations, the opportunity to collectively share knowledge, skills, experiences, tools, and innovative ideas is vital to making accessioning more functional, visible, and understood.

**Project Work Plan**

Since 2019, Rosemary K. J. Davis (Beinecke Rare Book & Manuscript Library, Yale University) and Meaghan O’Riordan (Stuart A. Rose Manuscript, Archives & Rare Book Library, Emory University) have engaged in a long-term research project to examine archival accessioning in the United States. We have presented at regional, national, and international conferences, including the 2020 Society of Georgia Archivists meeting, RBMS 2021, the 2021 Archival Education and Research Institute (AERI), and the 2021 SAA Research Forum. We were invited to speak as part of an esteemed panel of experts on accessioning for the launch of Audra Eagle Yun’s edited volume, *Archival Accessioning* (2021). Our writing on accessioning has been published in the *New England Archivists* newsletter and in the forthcoming *The Handbook of Archival Practice* (Rowman & Littlefield). In Spring 2021, we put out a call for applicants to be part of a Society of American Archivists sanctioned and supported working group, requesting information about personal identity, professional experience, and motivation to improve accessioning work. After receiving over 90 applications, we selected 30 archival practitioners who will be charged with developing comprehensive best practices for archival accessioning that can be deployed in all types of archives and special collections environments. Davis and O’Riordan, as well as subgroup leaders, expect to spend approximately 5-7 hours/month on this work during the term of this project. Working group members are expected to spend approximately 3-5 hours/month. Monthly meetings for subgroup leaders began in June 2021. The inaugural full working group meeting is in October 2021 with quarterly ones to follow. Between full working group meetings, subgroups will meet to work on their respective sections. IMLS funding would meaningfully enrich and support the goals of our working group. An overview of our proposed timeline:

- **Fall 2022-Winter 2022/3** → Participants work virtually within focused subgroups to write initial drafts of best practices sections and convene for virtual share-back, peer review, and strategy sessions.
- **Spring 2023** → Participants convene for a three-day summit to finalize a draft of the best practices to share out for broad and targeted public feedback. Each day will be split between collaborative writing/editing sessions (focused within each subgroup) and community-building and skill sharing sessions (for all working group members).
- **Winter 2023/4** → Using listservs, social media, and the research project’s website, public feedback will be solicited from SAA members and relevant sections, as well as from individuals in allied archives and special collections organizations throughout the country including RBMS, OCLC, NARA, and regional archives orgs including Northwest Archivists, New England Archivists, Mid-Atlantic Regional Archives Conference, Society of Southwest Archivists, Society of California Archivists, Midwest Archives Conference, and Society of Georgia Archivists.
- **Spring – Summer 2024** → Perform revisions based on internal peer review and public feedback; submit final revised draft to SAA Standards Committee for approval + subsequent publication in SAA Standards Portal, where access to the Best Practices will be freely available to all.

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- **Summer 2024** → Daylong public gathering adjacent to SAA annual meeting so working group members can publicly share final drafts and build community; will be free and open to all.
- **Fall 2024** → A free webinar will provide a primer on the best practices themselves, discuss community-building efforts focused on accessioning, and illuminate the development process for archival standards.

**Project Results**

Without nationally recognized best practices for archival accessioning, every individual and organization performing this work must develop their own practices from the ground up, leading to a massive duplication of effort, brilliantly innovative approaches that go unshared with a larger community, and piecemeal workflows that function more as stopgaps than as comprehensive and consistent strategies. Often accessioning is misunderstood or unacknowledged as essential within the profession. As a result, many people responsible for accessioning are tasked with doing so without the proper tools or a network of colleagues. Other critical functions—including reappraisal and deaccessioning, description, and digital preservation—have well-documented standards to follow, visibly situating that work as foundational and valued by the archival profession. While we acknowledge that flexible and iterative best practices for archival accessioning will be challenging to create, we believe it is important to do so and possible with the elite working group we have assembled. Conducting a project focused on the development of nationally recognized accessioning best practices tangibly addresses three immediate needs:

- **Systemic workflow improvements** → Comprehensive accessioning best practices will allow for more efficient and effective accessioning work throughout the archival profession. Collaborating with active practitioners from across the country helps ensure the best practices are structured, actionable, and thoughtful—by subdividing the larger working group into focused subgroups, we can create detailed guidelines that apply to all material types and can be scaled for use in any archival environment. While the finalized version of best practices will be published in the SAA standard portal, it will be open for use by all individuals.
- **Initiating community connections** → Project development events will help formally establish a community of practice where individuals performing accessioning can support and learn from each other. Being able to meet in person - if possible given funding and public health - is crucial to building and sustaining our community and allowing a natural flow of ideas and contemplative discussion.
- **Professional visibility** → Investing intellectual and financial resources in accessioning will provide recognition, support, and validation for individuals and organizations performing this work. Rounds of public feedback from an expansive spectrum of individuals and organizations throughout the field, along with outreach including conference presentations and the open-to-the-public SAA gathering, will raise awareness about the best practices specifically and about accessioning work more broadly.

**Diversity Plan**

In order to develop truly collaborative best practices, we want to eliminate as many barriers to participation as possible; our funding request includes allocations for honoraria, meals, travel, and lodging, so all individuals can take part in this community-building work without a negative economic impact. When selecting working group members from the applicant pool, we prioritized diverse applicants who were both qualified professionally and who self-identified as a member of a marginalized community. As a result, the working group membership includes individuals who identify as Latinx, disabled, LGBTQ+, Black/African American, white, and Asian-American. Members come from all levels of experience ranging from new professional (0-2 years of experience) to seasoned practitioner (10+ years of experience), and they work at historical societies, corporate archives, public and private colleges/universities, and philanthropic foundations. To create an actively anti-oppressive, safe, empathetic, and productive work environment, a detailed community contract and code of conduct will be developed and applied to all virtual and physical spaces.

**Budget Summary**

We request **\$245,791** from IMLS to fund this important work. Our budget overview:

- **\$113,676** → Resources for a three-day collaborative writing summit for all working group members in Spring 2023. Budget includes supplies, venue fees, technology, meal stipends, travel, honoraria, and 4 nights of lodging.
- **\$81,539** → Resources for a daylong public sharing session for all working group members + members of the archival community in Summer 2024, in conjunction with the SAA annual conference. Budget includes meal stipends, travel, conference registration, honoraria, and two nights of lodging for all working group members.
- **\$50,756** → Indirect costs incurred by Yale University at the rate of 26%.