Protocol for Special Collections Transport to and from 344 Winchester

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Summary: This document provides procedures for safely and securely transporting special collections material between special collections repositories and 344 Winchester.

I. PACKING

Special collections materials must be properly packed according to the following standards and protocols. Proper packing must not be compromised for any reason.

Wrapping: Bound materials without protective enclosures (boxes) should be wrapped in acid-free tissue or paper and then wrapped with plastic bubble wrap to prevent damage (dents, water damage, or rough handling). This is especially true for materials that are fragile and/or damaged/deteriorated (materials routed to Preservation). Any packing tape should be affixed to the bubble wrap only so it does not stick to the collection items. Books should be packed spine down, side by side, with filler material like crumbled paper or rolled bubble wrap in the empty spaces to prevent tipping and shifting of the books. Oversized books should be packed flat.

Detailed instructions for packing audiovisual materials and paper artifacts can be found on the NEDCC website.

When packing an object, remember it has inherent strength and pack it accordingly. Objects should be shipped in the position in which they are sturdiest. For example, paintings ship upright but works on paper ship flat.

Archival materials should be housed in folders and placed in a box. Consider placing that box inside a second box for shipment.

Use sturdy shipping boxes. Special collections must be protected from the elements by bins or other appropriate housing. If you are using a shipping vendor and need to provide shipping boxes, they should be solid enough to protect their contents and free of dents and deformations.

Consider using double boxes—an inner box and an outer box—to protect collections.

Consider lining shipping with a large, clean, heavy-duty plastic trash bag to prevent moisture and water seeping into totes. The bag should be sealed (taped or tied) after the collection items are packed. This is an important measure to take when collections must be shipped in inclement weather.

Library Collection Services (LCS) owns several styles of containers (often referred to as crates, bins, or totes) that can be used to transport library materials when LCS is used.

Born-digital media (Hard drives, CDs, DVDs, flash drives, and floppy, ZIP and JAZ disks):
• Pack CDs, DVDs, and disks on their edge—that is, they should be in a vertical position rather than laid flat. This is to minimize the surface area that could be hit in case of impact.
• Media such as disks, CDs, and DVDs should be housed in sleeves or other enclosures to prevent scratches. They should never be packed loose in a box.
• Individual hard drives or other media should not be able to move or shift inside the shipping container. Use foam pieces as spacers as needed. Keep sides of drives away from the sides of the containers.
• Label boxes on the outside to alert others to the magnetic media inside; the Digital Accessioning Service will provide these labels. Keep the media and shipping containers away from magnetic items.
• Please remember that the Digital Accessioning Service requires notification prior to shipment. Refer to the Digital Accessioning Service instructions regarding scheduling your shipment.

Oversized and folio-sized materials:
• Use shipping containers or totes that will accommodate larger materials, if possible.
  ○ For LCS shipments, the totes with the “PR” barcode fit most oversized and folio book materials (up to 12.25” W or 16.25” L in size) - NOTE: this is the maximum size that LSF will accept for book materials due to transportation limitations.
• Use portfolios and flatbeds to transport anything larger than the above referenced dimensions.
  ○ Pack portfolios so that they are able to be tipped, tilted, and shipped vertically whenever possible; use sufficient padding to prevent movement of the object inside of the portfolio.
  ○ Position and place the collection materials appropriately (toward the bottom of the case) to make them easier to move using the handles and to keep from tipping.
• Use padding (e.g. newsprint, bubble wrap, foam) in spaces inside the tote to prevent items from moving or shifting.

For fragile or unusual objects, contact the Preservation Department’s Preservation Services or Conservation & Exhibition Services for advice and assistance.

II. SHIPPING

All transport must be done by Library Collection Services (LCS) or by approved campus and external vendors, which include institutionally-owned vehicles, TR&S, or professional art handling and shipping services such as FAST, Artex, U.S. Art, or F.A.E. Please note that special collections materials should never be transported on foot or by personal vehicle.

When sending and receiving shipments, loading docks should be used when possible and the need to rearrange cargo outdoors mid-transport should be minimized.

All pickup requests must originate with the owning collection or designated units. If the requestor is not the same as the recipient, the requestor must consistently alert the recipient of the
shipment. If you must make a shipment to or from a building in which your unit does not have a service point, another unit with a service point in that building can facilitate the shipment; for example, Manuscripts and Archives could facilitate a shipment on behalf of Preservation for exhibitions in the Memorabilia Room.

Currently, it isn’t possible to send materials (other than Beinecke's) directly from LSF to Winchester without the materials first being sent to the unit who owns them. In other words, materials will always need to be released from the unit's own service point and can't be sent to Winchester directly from LSF.

**Scheduling the Shipment:**

**Vendor:** Contact vendors directly to arrange shipment.

**LCS:** LCS has created a form for you to use to schedule shipments. To obtain access to the form and obtain LCS shipping permissions, place an online [Service Request](#) to Library IT to add a user’s NetID to the Active Directory group “lib_lcsTransports_users.” Instructions for using the LCS form are [available online](#). When completing the online request form, be sure to use the notification email function to alert the recipient of the request.

All special collections units will work within an agreed upon lead time of at least one day for booking shipments; units will have the ability to provide a preferred delivery deadline if the shipment is not time-sensitive. Special collections units and Preservation should limit rush (less than 24 hour) or on-the-fly shipment as much as possible; however, procedures are in place to handle time-sensitive shipments. Please email the director of Library Collection Services, Mike DiMassa, and copy Gary Burcheski and Ian Cassell to schedule a rush shipment.

Consult the [LCS special collections deliveries chart](#) on the LCS website to see the service points for each of the dedicated trucks and the order deliveries are made throughout the day.

Materials may be moved between trucks at the Library Shelving Facility (LSF) and kept overnight in a controlled and secure environment. However, Beinecke materials may not be kept overnight at LSF during transport; please follow approved Beinecke-specific protocols for transport between 344 Winchester and other Beinecke locations.

Please note that non-containerized material will not be delivered by LCS staff in inclement weather.

**III. MANIFEST AND SHIPPING DOCUMENTATION**

Sufficient records and manifests for containers and shipments that document the chain of custody during transport must be generated and kept.

If you are not an Aeon user, the first step is to create an [inventory list of package contents](#). Place one copy in the box and keep one copy for reference. Be as specific as possible when
describing what is being shipped. A basic shipment manifest may be generated through the LCS request systems using the spreadsheet feature. Please note that you can put all of the barcodes of the items you are shipping into the LCS Transport form.

If you are an Aeon user, create a transaction in Aeon for each item being transported. In most cases, this can be accomplished by placing a request for that item in the usual way. However, transactions should still be created for items which are not yet processed or cataloged, or for archival collections where the item to be transported is smaller than the unit (or container) by which the collection is usually requested. For example, an archival collection may usually be requested by the box, but you may only be transporting a single item from the box. These requests should be placed manually and include as much specific description as possible. If required by unit policy, a copy of the request (call slip) should be left behind when the item is removed. One copy should travel with the item, and the third copy may be retained for reference.

Depending on unit policy, transportation of materials will be tracked using events or queues. All transactions for a single shipment should be associated with the appropriate event or moved to the appropriate queue for outgoing shipments. Subsequently, the requests associated with the event or queue should be printed, and one copy placed in the box. An electronic copy may also be sent to the receiving unit, if desired.

**Born-Digital Accessioning Project:**

If you are sending media to Beinecke (344 Winchester) for disk imaging, please also use the instructions provided by the Born Digital Working Group for entering metadata about the items in your shipment. Unique identifiers must be associated with each media item; see the Born Digital Working Group instructions for further information.

**IV. RECEIVING SHIPMENTS**

All delivered materials should be verified against manifests and examined for damage within 24-48 hours of receipt. Notice of receipt should be provided to the sender. If the owning unit uses Aeon, the materials should also be marked as "received" in Aeon within the same timeframe. Receiving units may not have Aeon access; thus, if the owning unit uses Aeon, it is their responsibility to track the transaction as "received." The receiving unit need only communicate receipt of the materials to the sender.

Discrepancies and/or damage will be reported to the collection owner using the form in Appendix A. Photograph damage. If an insurance claim is necessary, the collection owner should contact Risk Management.

Return shipments must go back to their originating location and cannot be sent to a new location.