TRANSPORTATION OF SPECIAL COLLECTIONS MATERIAL

Protocols for the Secure Movement of Collections to and from YUL @344 Winchester
WHY NOW?

• Critical special collections functions move to 344 Winchester (BRBL, Preservation)
• Digital Accessioning Service
• Tasked by Special Collections Steering Committee to develop requirements and guidelines
• Worked in conjunction with Library Collections Services (LCS) to ensure requirements and guidelines were compatible with available services
WHAT ARE THE ESSENTIAL REQUIREMENTS?

- Special collections objects must be properly packed according to agreed-upon standards and protocols.
- Special collections must be protected from the elements by bins or other appropriate housing while loading and unloading the transport vehicle or when rearranging outside vehicle at pick up locations.
- Sufficient records and manifests for containers and shipments that document the chain of custody during transport must be generated and kept.
- All transport must be done by Library Collection Services (LCS), or by approved campus and external vendors.
WHAT ARE THE ESSENTIAL REQUIREMENTS?

• Pickup requests must originate with the owning collection or designated units. Return requests must go back to their originating storage location.

• When the requestor is not the same as the recipient, the requestor must consistently alert the recipient of the shipment.

• Materials may be moved between trucks at the Library Shelving Facility (LSF) and kept overnight in a controlled environment.

• Units may facilitate shipments for senders without service points in a designated building, such as Manuscripts and Archives facilitating shipments for Preservation for exhibitions in the Memorabilia Room.
HOW ARE MATERIALS TO BE TRANSPORTED AND BY WHOM?

Moving special collections between 344 Winchester and other Library locations occurs on a daily basis.

All transport for special collections must be done by LCS or by approved campus and external vendors (e.g. TR&S, professional art handlers).

No exceptions.
HOW SHOULD MATERIALS BE PACKED?

Consider the inherent strength and vulnerabilities of the object when packing

Wrap items in paper and plastic bubble wrap

Pack books spine down, side by side

Oversized and folios flat

Archives in folders in boxes

Use filler material (crumpled paper; rolled bubble wrap or foam) to prevent tipping and shifting
WHAT ARE OUR OPTIONS FOR SHIPPING CONTAINERS?

LCS has a variety of containers ("totes") available for transport

List of totes with dimensions available on LCS website
WHAT ABOUT MATERIALS THAT DON’T FIT IN A TOTE?

Flatbed trucks for smaller flat archival boxes. There are also panel truck (seen here) and portfolios are available for items that may be transported vertically.
WHAT SECURITY MEASURES ARE CRITICAL?

Use numbered zip tags to close totes
LCS can provide zip tags – just ask them!

For all non-internal Library transfers of special collections, units should have a “checks and balances” procedure in place where more than one person verifies what is included in a package or shipping container before it is sealed.
HOW ARE SHIPMENTS ARRANGED?

For LCS: use Microsoft Access form to schedule shipments
LCS created instructions for using the shipment request system
Specify the appropriate **Drop Point**!
Be sure to notify the receiver of the shipment (email notification button)
LCS uses drop point locations to create their schedule of deliveries and pick ups. *They will only deliver your shipment to the drop point you provide.*

Some drop points are shared by multiple departments and units. Supplying an address label for the containers helps collection and 344 Winchester staff quickly sort deliveries.
WHAT ABOUT MATERIALS LCS CAN’T TRANSPORT?

For Outside Vendors: contact vendors directly to arrange shipment

Seek recommendations from Preservation Department or Beinecke’s Preservation & Collection Management unit.
WHAT DOCUMENTATION IS REQUIRED? (AEON USERS)

A container or shipment manifest is required

Step-by-step instructions are available on the Special Collections Transport LibGuide
WHAT DOCUMENTATION IS REQUIRED? (NON AEON USERS)

A container or shipment manifest is required

Create an inventory list of package contents

A simple manifest of barcodes can be created through the LCS form

Building Excel barcode list in the LCS requests system
A container or shipment manifest is required

Use instructions provided by the Born Digital Working Group

Link to instructions can be found on the Special Collections Transport LibGuide
WHAT IF THERE IS SOMETHING WRONG WITH A SHIPMENT?

All delivered materials should be verified against manifests within 24-48 hours of receipt to make sure everything is accounted for and that there is no damage.

Photograph damage and report it to the originating collection.

If an insurance claim is necessary, the collection owner should contact Risk Management.
WHERE CAN I FIND ALL OF THIS INFORMATION FOR FUTURE REFERENCE?

http://guides.library.yale.edu/specialcollectionstransport

- YUL LibGuide: Transportation of Special Collections Materials FAQs
- Links to protocols document
- Templates for labels and damage reporting
- Contact information for questions
- Convenient links to LCS and other sites
- Announcement of upcoming training sessions
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• Library Collection Services
• Members of the Born Digital Working Group
• Steve Ross from Manuscripts and Archives
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• Members of the Special Collections Steering Committee
QUESTIONS?
ARE THESE PROTOCOLS ONLY FOR TRANSPORT TO 344 WINCHESTER?

• Yes, at this time the protocols are in place for the transport of special collections to and from 344 Winchester from other Library locations.

• Many of the guidelines, such as those about packing, are relevant to other circumstances as best practices.

• There may be additional requirements for specific collections and for other circumstances, example: loan to a museum

CAN MATERIALS BE RETURNED TO LOCATIONS OTHER THAN THEIR COLLECTIONS?

• No, the expectation is that materials will be returned from 344 Winchester to the “owning” collection. If it came from MSSA, it goes back to MSSA, not Medical or Music.
WHAT IF I AM NOT SURE HOW TO PACK SOMETHING?

• Start with the resources on the LibGuide
• If you still aren’t sure, contact us!
• We will provide suggestions/training or come and help pack on site if needed.

IS THERE A DAMAGE REPORT FORM?

• Yes there is a basic form available on the LibGuide, which should be used to report any damage noticed.
WHAT ABOUT A RUSH TRANSPORT?

- Service expectations have been set for deliveries with LCS.
- Try to limit as much as possible
- Contact LCS/ Mike DiMassa to schedule a RUSH shipment

WHAT IF IT RAINS OR SNOWS?

- Inclement weather can delay shipments
- Materials that are not containerized and well protected will not be delivered by LCS staff in inclement weather.
HOW DO I DEAL WITH VERY SMALL ITEMS OR A SINGLE BOOK?

• All items and shipments, regardless of size must be containerized.

• Put items inside a larger page or other box, then put that inside the totes to help fill the space.

• There is no reason not to use the smallest of the totes from LCS or to wait for more things if your work demands the object be moved.

• There will always be objects or items that exceed any containers we have on hand.

• Custom solutions will be needed in the short term – consult with preservation staff about art handling services or TR&S.

• Keep track of how many of these items you need to move and how often – we can use this information to compare costs/benefits for acquiring new, custom-sized containers.

IT’S BIGGER THAN A BREAD BOX (A LOT BIGGER)?

ADDITIONAL QUESTIONS POSED AT THE FORUM
WHAT IS A REDELIVER?

• A redeliver refers to transport shipping other than LSF to the stewarding/owning collection.

• A tote picked up from MSSA to be delivered to Conservation & Exhibition Services is a redeliver.

ADDITIONAL QUESTIONS POSED AT THE FORUM

IS THE CHECKS AND BALANCES NECESSARY FOR EVERYTHING?

• Ideally yes, but in practice for many special collections this might prove a challenge.

• If the system can’t be done for everything, it should always be done for shipments that are not the standard LSF-to-collections-to-LSF.

• A checks and balance procedure is essential for shipments to campus museums and other non-Library locations. This is also key for working with outside vendors.

• This a also good idea for those using MSSA as a drop point hub.
If I am shipping my collections through MSSA, will they create the manifests?

- MSSA serves as the drop point/pick up location for those special collections that are not drop points for LCS deliveries.
- MSSA will handle the shipment scheduling with LCS, but they will not pack or prepare manifests for your materials.
- MSSA is not responsible for delivering totes to other collections – staff from those collections should make arrangements to pick up, drop off and return empty bins to MSSA.

Should collections be creating outgoing manifests for returns to LSF?

- Ideally yes. This can be done via Aeon or using the Excel barcode feature in the LCS scheduling tool.
- An item count is better than nothing.
- The manifest is the only way LSF can know that all of the items intended for refiling are present in the shipment.
DO THESE PROTOCOLS ONLY APPLY TO SPECIAL COLLECTIONS?

- The protocols are intended for special collections and any “reading room use only” collections.
- These protocols are also relevant to materials with security issues that aren’t classified as special collections – example: electronic records on a hard drive that contain restricted or confidential information.
- Also relevant for materials that are uniquely fragile or damaged, and for media (cds, audio recordings, videotape) that is inherently vulnerable to cold, heat, moisture and movement.
There are label templates on the LibGuide that may be customized by replacing the text with the appropriate information. Individual units and departments may create a set of customized templates for their units and frequent addressees.

The outside labeling will not affect the delivery by LCS. LCS will use the drop point specified in the scheduling tool. They will not redirect if there is a discrepancy. When they see a problem, they will contact the shipper for clarification.

There are three essential components of secure transport documentation: LCS shipment log (drop points), containers labels (specific person(s)/unit), and tote contents manifest (inventory of each totes contents).
THE END