

# Saskatchewan Council for Archives and Archivists

## Project Time Guidelines

### Institutional Grant Program

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## **1. Introduction:**

Trying to figure out how long a project – or a part of a project – will take to complete can be difficult. The Saskatchewan Council for Archives and Archivists (SCAA) has edited the guidelines created by the Canadian Council of Archives (CCA) to use for projects involving the arrangement, description and processing of records (see Appendix A). In addition, the SCAA has created guidelines for re-description, indexing and scanning projects.

In the guidelines, we have identified different project types, broken them down into their constituent elements and provided a range of estimates (based on complexity of the records or degree of difficulty involved in working with them) of how long each task could be expected to take. Records that arrive neatly boxed and foldered, with file lists and disposition schedules, for example, are going to be relatively simple to work with and thus would warrant a lower estimate. Records that arrive in the archives as large piles of loose material dumped unceremoniously on the table will require substantially more time to deal with. But archival collections are always unique and the recommendations in this document should be considered as starting points only.

You *must* honestly justify your time estimates, particularly if they are especially high. Special circumstances must be noted and a convincing rationale provided. It is not enough to say “the guidelines allow me to claim such-and-such an amount of time, thus I will.” The difference between the time required to write full, item-level descriptions for every photograph in a collection versus the time it takes to lump them together by subject, for example, will be considerable. Your application must make that distinction. Failure to provide adequate justification for extremely high time estimates will negatively affect the success or failure of your application.

Upon initially examining the records, available information, etc., determine the rate to be used for each task (or the volume of material that falls under each rate), and enter it on the spreadsheet. *Applications that assign maximum time allocations for every category must make a strong case for the need for such resources and the importance of the holdings.* Remember that not all projects will require all tasks to be completed, e.g., in some instances; background research and/or finding aid review may not be necessary. Do not add time for work that is not necessary.

All work that you claim to have done must, of course, actually be done.

## **2. Arrangement and Description Projects**

Please see Appendix A for details. One interesting element of the guidelines is the ability to break a collection into components, with different time requirements for processing. For example, a collection might include several boxes of individual case files that are to be described in detail, along with boxes of ledger books that take up a large volume but can be described very easily. The spreadsheet we have developed will allow you to enter the volumes for each of these types under the appropriate rate, and get a total at the end.

The guidelines separate the functions of appraisal, arrangement, description and finding aid preparation. While conceptually separate, these tasks are most likely going to be done together as

the archivist works through the records. It is theoretically possible to create a project where one person does arrangement, for example, while another busies herself only with description. But in practice these tend to happen simultaneously. This is not a problem if one person is doing all the work, but may create issues when trying to assign different parts of the project to different staff.

The creation of finding aids is only addressed in the guidelines for textual records. For photographs, maps and plans, and moving image and sound records, we have included a section in the spreadsheets for “Finding Aid Review”. This is to allow the archivist or supervisor a chance to proof and review the finding aids. The time needed will depend on the size of the collection, and assumes item-level description.

### **3. Scanning projects:**

These guidelines assume that all scans can be done in one pass and that there will be no additional digital manipulation of the images.

For projects not requiring selection (for example, complete photograph fonds), scanning & refolding: 50-70 images/day (10 minutes per image, for scan & thumbnail)

For projects requiring selection: 25-35 images/day (15 minutes per image)

For projects requiring scanning & description: follow description guidelines for photographs and use appropriate scanning guidelines.

(The time requirements for projects with more complicated scanning or digital manipulation components vary too widely to allow standardized guidelines. Those undertaking projects in which oversized material will be scanned separately then stitched together, or photographed in a copying station, or projects such as virtual displays which may require additional post-processing of images, should do a small sample first in order to create reliable time estimates. Alternatively, this kind of project can be farmed out to a third party, who will provide an estimate of time and costs that can be used as the basis of a project application.)

### **4. Re-description projects:**

Fonds-level only:

The number expected will vary according to the amount of work required. For example:

If requiring biographical note / administrative history: 3/day

If requiring only extent: 10/day

Series-level only:

The number expected will vary according to the amount of work required. For example:

If re-describing following the Australian series system: 3/day

If enhancing existing descriptions: 10/day

## **5. Indexing projects:**

For projects requiring substantially new subject authorities, preparation of these authorities and their ongoing development throughout the project is expected to take 20% of the total project time. The actual indexing should probably be calculated at 40-50 subjects/day

For projects transcribing personal names or geographical place names, developing policies regarding name authorities should not take more than 5% of the total project time. The actual indexing should probably be calculated at 75-100 names/day

## **6. Thematic guides:**

For projects locating and reviewing materials from within a larger collection or from a variety of sources (including multi-institutional projects) describing these holdings at the file-or item-level, we advise creating or using a subject authority (20% of total project time).

Location, review and description should probably be calculated at 10-20 files per day, or 30-40 items (if photographs, maps, etc.)

## **7. Project administration:**

SCAA funds cannot be used for administrative costs, but may be an eligible expense for some matching grant programs. The cost of project administration may not exceed 15 % of the total project and can include:

- : Interim and final reports (1-2 days total)
- : Budget administration (1-2 days) – for very large, multi-staff projects
- : Staff orientation (NOT training)
- : Staff supervision.

No guideline exists for the amount of time supervision will take. Variables will include number of staff being supervised, complexity of the project and capabilities of the staff (if known). As a completely arbitrary starting point, one may add the time of all supervised staff together and multiply it by 15% (remember that the supervisor may not supervise him or her self!). Multiplying this by the supervisor's wage will give you a dollar value for this element of the project to use on the application form. In many projects, this will take you over the 15% administrative threshold and will need to be scaled back.

## Appendix A: CCA Time Guidelines for Arrangement and Description Projects

### Textual Records:

#### *Introduction*

These guidelines may be used in calculating eligible expenses for projects that focus on the arrangement and description of fonds or collections. Within all categories, except **Background Research** and **Finding Aid Production**, segments of a fonds or collection can use different categories of time allocations for the purpose of calculating the time necessary to complete the activity. For example: for the initial assessment of 4 meters of material more than one rate can be used to calculate the allowable time for that step. One meter may be more complex than the rest and therefore require the highest allowable time, .5 meters per day, while the rest, 3 meters only needs the rate of 3 meters per day. This would provide an allowable total allocation of 3 days for that phase of the work. All such use of varying rates must be explained in detail.

*Applications that assign maximum time allocations for every category must make a strong case for the need for such resources and the importance of the holding. Not all categories need to be applied for.*

#### *Background Research:*

5 days per project - if more than one fonds/collection is involved there are three options: submit each as separate projects, undertake at this rate [5 days only], or if the work is of a re-description nature, rather than arrangement and description, submit using re-description guidelines

#### *Appraisal:*

This will include appraisal, selection, physical evaluation, and/or preliminary sorting or consolidation.

0.5 m per day	Material in no order, not in file folders, or folders untitled. No list exists, no file system used or evident, and significant reduction required
1.0 m per day	Some file titles or divisions, but heavy weeding to be done to reduce size
1.5 m per day	Physical control in place, some sorting/review needed, selection reduces size
3.0 m per day	Ledgers, minutes, or a file plan that will be retained

*Arrangement:*

All aspects involving the physical arrangement of the contents.

0.5 m per day	No discernable order, significant comparison needed with various parts of fonds/collection to construct files and then order files
1.0 m per day	Material is in files but relationship between files is tenuous and hierarchy of series and files is not evident
1.5 m per day	Relationship of series or grouping of files is unclear
3.0 m per day	Series and lower order is in place, little more involved than verifying filing plan (alphabetical, chronological or alpha-numeric system)

*Description:*

This encompasses all aspects of the intellectual process of ascribing the descriptive elements for the fonds and any other levels in the hierarchy down to the file level.

0.5 m per day	Files, sub-series, series and fonds/collection descriptions need to be created from scratch. Significant series require RAD descriptions.
1.0 m per day	Significant work is required at either the file or series level.
1.5 m per day	Information for file and series descriptions is available or self-evident and it is just a matter of compiling it. Some complexity to series but material arrived with substantial contextual data for description elements and hierarchical structure
3.0 m per day	Arrangement is simplistic or straightforward with significant homogeneity within series and uncomplicated relationships between series and sub-series.

*Physical Processing:*

This will include all aspects relating to the preservation and housing of the material.

1.0 m per day	Significant flattening, removal of staples, replacement of paper clips and/or replacement or addition of file folders and boxes
1.5 m per day	Refoldering and reboxing required, some need for replacement of paper clips and staples
3.0 m per day	Only some reboxing/refoldering required

*Finding Aid Production:*

Generally, the length of time for finding aid production will be in proportion to the extent of the collection, the level of description, the number of files, and complexity of arrangement.

2 m or less	1-2 days
3-5 m	3-4 days
6-10m	5-6 days
11-15 m	7-8 days
16 m or more	9-10 days

*Arrangement, description, and physical processing times are based on the extent of documents after selection*

**Photographic Records:**

Appraisal & selection	200 images / day (based on the initial number of images)
Arrangement	50 images / day (based on the final number of images)
Description	50 images / day (based on the final number of images)
Physical processing	100 images / day (based on the final number of images)

**Sound Recordings and Moving Images**

Appraisal and selection; Arrangement; Description; and Physical processing: 4 times running time of recordings (total – 1x running time for each task).

**Architectural and Cartographic material:**

Appraisal & selection	25 items per day
Arrangement	50 items per day
Description	20 items per day
Physical processing	20 items per day

*These are provided as guidelines only to assist in the determination of time required. Applicants will, of course, base their calculations on the state of the records being processed.*