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This study examines the evolution of archival description at the Southern Historical Collection at the University of North Carolina at Chapel Hill. This study was conducted to analyze changes in the structure and contents of finding aids produced at the Southern Historical Collection from the 1930s through 2003, and to determine the degree to which these changes reflect the development of archival description at a national level.

The Southern Historical Collection has updated its finding aids numerous times from the Works Progress Administration inventories used in the 1930s, to the EAD finding aids produced today. A description and comparison of these various finding aids not only illustrates the evolution of descriptive practices used at the Southern Historical Collection, but it also provides insight into the American archival profession's shift from adapting national guidelines on archival description to fit individual repository needs to the implementation of national descriptive standards.

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THE EVOLUTION OF ARCHIVAL DESCRIPTION AT THE
SOUTHERN HISTORICAL COLLECTION

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INTRODUCTION

J.G. de Roulhac Hamilton, history professor at the University of North Carolina, began acquiring private manuscript collections relating to Southern history in 1927. He traveled throughout the South soliciting donations, and he was so successful that he earned the nickname “Ransack.” In 1930, the University formally established the Southern Historical Collection to house Hamilton’s acquisitions and the collections of the former North Carolina Historical Society. The Southern Historical Collection grew to become one of the most prominent repositories of Southern history materials. By 1955, the collection numbered over 2,500,000 items, and by 1970, it had grown to over 5,000,000 items. Today the Southern Historical Collection continues to attract scholars from around the world interested in researching the American South.¹

The Southern Historical Collection operates with two major goals, as outlined by former director J. Isaac Copeland: “to preserve the priceless sources of southern history and to organize and describe the materials so they are readily available for research.”² Archival description is the key to realizing these goals because it allows the repository to maintain physical, administrative, and intellectual control over its collections, while providing a means to create access tools. Although numerous access tools exist, such as catalog records and collection guides, the primary means of access to materials in the Southern Historical Collection are finding aids, also referred to as inventories or surveys. Finding aids provide administrative documentation, provenance, and content information for individual manuscript collections, and even though the format is structured, it is

flexible enough to allow for the unique nature of the materials. The format and content of the Southern Historical Collection's finding aids have changed significantly over the decades, evolving from the typed Works Progress Administration forms of the 1930s to electronic documents in Encoded Archival Description (EAD).

Until the emergence of EAD as a content standard for archival description in 1996, the content and format of finding aids remained highly localized, with repositories tailoring established guidelines to fit their specific needs. In the 1980s, the development of MARC-AMC led to a cataloging standard for archival materials, but the structure and content of finding aids was still largely defined by local practices. Several notable manuals offered guidelines for archival description, but institutional practices adhered to these guidelines to varying degrees. However, the increasing availability of computer and internet technology led the profession to realize the potential of standardization as a means to create universal access to finding aids, thus prompting the development of EAD. Numerous institutions have adopted EAD, and although universal access is not yet a reality, the uniform structural content of EAD makes it a feasible goal.

This paper explores the evolution of the structure and content of finding aids at the Southern Historical Collection in relation to noteworthy guidelines that have shaped descriptive practices on a national level. The history of archival description at the Southern Historical Collection mirrors the American archival profession's efforts to standardize archival description. Although the profession did not officially develop standards until EAD, several notable sets of guidelines did exist that suggested best practices. Even though institutions often adapted these guidelines to best fit their own needs, they did serve as the foundation for archival description. The Southern Historical

Collection has long been considered to be a prominent manuscripts repository, and this study will determine how closely its descriptive practices, exemplified in finding aids, reflect the practices outlined in the noteworthy guidelines of the 1960s through the 1990s, including EAD. No comprehensive study of descriptive practices at the Southern Historical Collection has been conducted before, and it is important for institutions to reflect on past experiences in order to best prepare to meet future goals and challenges. Moreover, an evaluation of how the Southern Historical Collection has grappled with the issues of archival description is important in understanding how the practices of individual institutions relate to description trends in the United States.

In order to explore the evolution of finding aids at the Southern Historical Collection and its relation to the American archival profession's efforts to standardize descriptive practices, the elements under examination must be clearly defined. Using the definition devised by the Society of American Archivists Working Group on Standards for Archival Description, archival description can be defined as: "the process of capturing, collating, analyzing, and organizing any information that serves to identify, manage, locate, and interpret the holdings of archival institutions and explain the contexts... from which those holdings were selected." In other words, archival description is the process of establishing physical, administrative, and intellectual control over collections to make them usable, and the resulting product is a finding aid.³

For the purposes of this study, a finding aid is defined as a document, either paper or electronic, that supplies information about an archival collection in order to provide administrative control and make it available to researchers. Finding aids are the product of archival description, and include inventories and surveys, but exclude catalogs, guides,

and indexes. Thus, even though MARC-AMC is a form of description, it is not included in this study because it is a cataloging standard. The finding aids generated by the Southern Historical Collection have evolved over time, reflecting changes in archival description practices and the development of standardization at the national level.

LITERATURE REVIEW

A review of the literature relating to the development of descriptive practices in the American Archival profession provides insight into the development of description at the Southern Historical Collection. One of the most preeminent manuscript repositories in the nation, the Southern Historical Collection has continually strived to remain up-to-date with new developments in the field. Practices at the Southern Historical Collection do not precisely duplicate national trends, because arrangement and description historically have been considered highly individualized processes with nationally issued guidelines being adapted to local needs. Each repository developed its own procedures to best handle its collections, and the Southern Historical Collection is no exception. This localization of descriptive practices is happening less since the development of MARC-AMC and EAD and the growing realization that the unique character of manuscript collections can be adequately captured through standardized forms of description.

The professional literature concerning archival description is comprised primarily of journal articles, books, and guidelines or manuals. These writings chronicle the development of descriptive practices in the American archival profession and focus on both theoretical concepts and practical applications, including case studies that illustrate certain institutions or practices. Because description is one of the cornerstones of processing collections and making them available for public use, much has been written on the subject in the past seventy years. Noticeable gaps do exist, though, despite the large amount of writing devoted to various aspects of archival description. For example,

very little of the literature chronicles the history of archival description for individual institutions, especially through an examination of their finding aids. Furthermore, even though much has been written on how to describe manuscript collections, relatively little describes how repositories have used, or not used, nationally advocated guidelines for description, and what has been written often reveals discrepancies between the guidelines and actual practices. In order for the profession to make optimal use of standards such as EAD, it needs to understand how local repositories like the Southern Historical Collection adopt and adapt national trends in archival description to their own practices. Thus, in addition to the importance of this study as an historical analysis of archival description at one institution, this evaluation of how the Southern Historical Collection has grappled with the issue of archival description is important in understanding how the practices of individual institutions relate to description trends in the American archival profession.

An extensive body of literature focuses on the various aspects of archival description and its resulting products, including finding (also referred to as surveys and inventories). The majority of the material deals with theoretical concepts and practical applications, documenting the profession's effort to define archival description and determine the best methods of practice. Major breakthroughs such as MARC-AMC and EAD have received significant attention as archivists seek to explain the development, structure, implementation, and impact of these new tools. Much of the literature focuses on new developments and future aims –only a small segment is reflective in nature. Rather than recounting the history of archival description, most archivists focus on the

present and the future as they cope with the issue of archival description and the process of standardization.

Much of the literature is available in the *American Archivist*, the official publication of the Society of American Archivists, which is the largest and most influential professional archival organization in the nation. The Society of American Archivists has also published sets of guidelines and other materials relating to archival description. Although many of the materials outlining new developments and best practices are significant on their own merit, the literature is most valuable when viewed as a whole. Assessing the literature as a single body contextualizes the development of archival description and standardization in the United States in a manner that is impossible by analyzing individual writings.

Early literature on American archival description dating from the 1940s through the 1970s focuses chiefly on the development and implementation of sound practices, but not specifically on the standardization of those practices, because the nature of archival work was thought to be too unique to conform to a uniform set of standards. The literature is divided between theoretical discussions, practical applications, and case studies, with much of the material centering on cataloging and classification techniques, and descriptive tools such as including inventories, indexes, guides, and catalogs.

William J. Van Schreeven's article, "Information Please: Finding Aids in State and Local Archival Repositories," from the July 1942 issue of the *American Archivist* outlines the functions of major archival description tools, including inventories, but he upholds the common belief that they functioned as instruments to provide intellectual and physical control over collections rather than as research tools for users. Van Schreeven's ideas on

archival description closely resemble those of T.R. Schellenberg, who during his lengthy career at the National Archives from the 1930s through the 1960s, developed guidelines for the management of archival materials, including description.⁴

A good example of a case study illustrating local practices is “A Ten Year Experiment in Archival Practices,” an article in the October 1941 issue of the *American Archivist* which chronicles the establishment of a manuscript department at Duke University in 1930. This article explains how Duke dealt with the issue of establishing control over its collections, including the difficulties of determining how to best arrange and describe collections. The challenges Duke faced parallel many of the issues that the Southern Historical Collection had to confront during the same period. As both repositories discovered, developing description policies involved experimentation with various techniques because of the lack of standardization. Even though the two repositories are only ten miles apart, they each developed different and individualized systems for processing collections.⁵

Kenneth Duckett’s book *Modern Manuscripts*, published in 1975, provides a thorough guide to the handling of manuscript collections, ranging from acquisitions to processing and patron services. Although he devotes more coverage to cataloging, Duckett advocates the inventory as “the best tool yet devised for maintaining bibliographic control over huge twentieth-century collections; and in a condensed form, it is useful in describing collections of one box or larger.” Unlike many earlier writers, Duckett does not specifically state that inventories should only be used by staff for intellectual and physical control of collections. The elements he recommends for inclusion in inventories are similar to those advocated in David Gracy’s *Archives and*

Manuscripts: Arrangement and Description of 1977. Noting the lack of standardization in inventories, Duckett points out the degree of variation in finding aids, ranging from those that are “very mechanical, with a few lines for history and content and the bulk of the pages devoted to a container or folder list,” to much more descriptive inventories containing detailed biographical sketches, scope and content notes, and provenance information. Duckett also looks toward the future, mentioning the prospect of using computers to help standardize and upgrade inventories and catalogs.⁶

During the mid 1970s, the Society of American Archivists began to investigate the standardization of finding aids, and in 1976, the Committee on Finding Aids published *Inventories and Registers: A Handbook of Techniques and Examples*. The prospect of using the SPINDEX II computer system for describing collections prompted the SAA to study finding aids with the goal of establishing standards. In order to understand and describe current practices, the Committee collected samples from repositories “thought to have effective finding aid programs.” They then analyzed the structure and components of the finding aids and presented their findings in the handbook, which provides a description and examples of the basic components of finding aids, including the preface, introduction, biographical sketch, scope and content note, series description, container listing, item listing, and index.⁷

Some of the most important materials documenting the profession’s awakening realization to the possibility and importance of standards did not appear for another fourteen years. Following the success of MARC-AMC as a standardized cataloging tool for archival collections, the Working Group on Standards for Archival Description sought to determine the feasibility of standardizing archival descriptive practice, and its findings

are presented in volume 52 of the *American Archivist* in 1989/1990. Although MARC-AMC revolutionized the cataloging of manuscript collections and made possible an automated union catalog of archival materials, catalog records did not provide a substitute for finding aids. Because of length limitations, MARC records usually contain summaries and collection-level descriptions—the format does not accommodate detailed content listings. The development of MARC-AMC, however, led the archival community to realize that the standardization of descriptive processes was indeed possible and that it provided benefits that were unattainable as long as descriptive practices remained localized and individualized.⁸

The Working Group's report is noteworthy in that it fleshes out the meaning and role of archival description. Whereas the SAA defined archival description in 1974 as "the process of establishing intellectual control over holdings through the preparation of finding aids," the Working Group presents a more process-oriented definition that takes into account the life cycle of archival and manuscript materials. Its definition incorporates the gathering and analysis of information to assist in the identification, management, and interpretation of collections, which helps to place materials into the context of their creation and use. The Working Group's report also provides an historical overview of archival description and outlines the benefits and limitations of standardization. In addition to pointing out milestones in the development of American descriptive practice, the historical overview also chronicles the shift of thought in the 1970s from the belief that standardization was impossible to the realization that automation made standardization a necessary and desirable objective. The Working Group cautions archivists, however, that "standards are not ends in themselves, but

means to an end” and that the development of standards requires both cooperation and consensus.⁹

Individual articles by members of the Working Group contain in-depth conceptual discussions and work to create a framework for the development of standards. Whereas the Working Group report serves mainly to acquaint the archival community with the issue, the individual articles provide more detailed discussions on the importance of developing archival descriptive standards and the best ways in which to proceed. Moreover, the articles present individual viewpoints on the situation and serve to foster debate within the archival community. In “Description Standards: A Framework for Action,” David Bearman devises a matrix to help the profession cope with the issues involved in developing and promoting standards. “Archival Description Standards: Concepts, Principles, and Methodologies,” by Lisa Weber, conceptualizes archival descriptive standards and relates them to the development of library standards. Richard Szary proposes methods to evaluate the standards process in his article “Archival Description Standards: Scope and Criteria.” The *American Archivist* issue also contains a detailed bibliography of description manuals and materials concerning standards for archival description. The products of the Working Group were a pivotal step in bringing the issue of standardization to the forefront of the archival profession, thus paving the way for the development of EAD.¹⁰

The next major event to capture the attention of the American archival community and prompt a large amount of literature was the development of Encoded Archival Description (EAD) as a standard for archival description in 1996. Conceived by the Berkeley Finding Aid Project as an encoding standard for finding aids, EAD is a

Document Type Definition (DTD) of the Standard Generalized Markup Language (SGML) and the Extensible Markup Language (XML). As the *EAD Tag Library Version 1.0* explains, EAD was designed as “a set of rules for designating the intellectual and physical content of archival finding aids so that the information contained therein may be searched, retrieved, displayed, and exchanged in a predictable platform-independent manner.”¹¹

Archivists had been making finding aids available on the World Wide Web, first as text files, such as ASCII and then as HTML documents, but these both had limitations. Although HTML allowed archivists to enhance the presentation of the finding aids, it did not provide any mechanism for encoding the structure and content of finding aids and thus it could not “ensure data permanence and facilitate future migration data.” EAD, on the other hand, provides a structural standard that retains the hierarchy of finding aids and enhances their searchability, but it is not a content standard, and does not regulate the quality of the information that is placed in the structural elements. As the *Tag Library* explains, EAD “identifies the essential data elements within finding aids and establishes codes and conventions necessary for capturing and distinguishing information within those elements for future action or manipulation.” Moreover, in order to make the transition to EAD as smooth a process as possible, EAD is flexible in that it allows for varying levels of encoding as long as the required elements are present.¹²

The *American Archivist* devoted two entire issues to Encoded Archival Description in 1998, highlighting its importance to the archival community. The articles, which were also published as a book, *Encoded Archival Description: Context, Theory, and Case Studies*, cover the development, structure, and context of EAD, and include

case studies detailing its implementation in various archival settings. Daniel Pitti's introductory article, "Encoded Archival Description: The Development of an Encoding Standard for Archival Finding Aids," provides background information on EAD's development and early implementation. Pitti outlines the rationale behind EAD, emphasizing the potential for increased searching capabilities and universal online access of finding aids. Contextualizing the development of EAD, Pitti discusses earlier efforts to provide universal access, such as the *National Union Catalog of Manuscript Collections*, and he explains how MARC-AMC helped to pave the way for an encoding standard for finding aids.¹³

In his article "EAD as an Archival Descriptive Standard," Kris Kiesling outlines the standardization process for EAD. Although it was designed as a standard for the structure of finding aids, Kiesling believes that archivists can work towards making it a content standard as well. However, he cautions that even though EAD can standardize the structure of their finding aids, it does not standardize their content and presentation. He also expresses concern that repositories will apply EAD to their finding aids in the same manner that they did HTML, "just marking up whatever they currently have in paper format and putting it on a server for anyone who might stumble across it." Instead, Kiesling recommends that repositories should review their finding aids before encoding them to ensure high quality content and presentation.¹⁴

Dennis Meissner's case study "First Things First, Reengineering Finding Aids for Implementation of EAD," reinforces Kiesling's recommendations, explaining how the Minnesota Historical Society redesigned its finding aids to comply with the structural and content elements of EAD. Although their old finding aids contained many of the same

elements that were present in EAD, the encoding process led the Minnesota Historical Society to rethink the logical organization of its finding aids with the aim of making them both EAD compliant and easier to use. Meissner reflects on the process: “although it is tempting for a repository to begin its work with EAD by marking up its existing finding aids as they are, more satisfying results will ensue if the repository invests some time up front in assessing, and perhaps revising, its finding aid model.”¹⁵

Another noteworthy collection of articles relating to EAD is *Encoded Archival Description on the Internet*, which was also published as volume four of the *Journal of Internet Cataloging* in 2001. This compilation provides a more recent look at EAD, now that the profession has had some time to reflect on its implementation and implications. As Helen Tibbo explains in a review of the book, “the articles discuss the fundamentals of archival arrangement and description and illustrate how EAD facilitates descriptive practice and extends reference and access in an electronic networked environment.” The articles cover the theoretical foundations for the development of EAD and place it into context with other descriptive standards, especially the international standard ISAD(G). Other articles explore the role of cooperation among archival institutions as a means to promote union access to materials, and examine how EAD is being used in a variety of settings, and how it has affected reference service and increase the accessibility of finding aids. Although EAD has been in use for several years, it is important for the archival community to continue analyzing its role as a descriptive standard, because reflection is essential in determining the success and future role of EAD.¹⁶

METHODOLOGY

The aim of this study is to analyze changes in the content of finding aids at the Southern Historical Collection and to indicate the degree to which those changes reflect the practices advocated on a national level. The literature review set the context for the study by providing an overview of description trends that have affected the American archival profession, including the Southern Historical Collection. An assessment of guidelines that have influenced descriptive practices on a national level and at the Southern Historical Collection allows comparisons to be drawn between national descriptive trends and changes in descriptive practices at the Southern Historical Collection. The influential guidelines under examination include the WPA Historical Records Survey, T.R. Schellenberg's *The Management of Archives*, David Gracy's *Archives and Manuscripts: Arrangement and Description*, Fredric Miller's *Arranging and Describing Archives and Manuscripts*, and the EAD version 1.0 guidebooks *EAD Application Guidelines* and *EAD Tag Library*. A detailed examination of the history of description at the Southern Historical Collection further relates national descriptive trends to local practices and demonstrates how an individual repository adapted its practices to accommodate new developments in archival description.

This study analyzed the different finding aids produced at the Southern Historical Collection since the 1930s in order to fully understand the impact of content changes in finding aids at the Southern Historical Collection and their relation to national trends. Over seven different finding aid styles have been used over the past seventy years, and

each differs to some degree from its predecessor. To illustrate changes in content and structure over time, the various types of finding aids used at the Southern Historical Collection were described in terms of content and structure, and multiple finding aids of the same format were compared to check for consistency. The different generations of finding aids were also compared to provide a comprehensive overview of changes in the finding aids. Finally, the various versions of Southern Historical Collection finding aids were compared to the appropriate national guidelines to assess the degree of conformity to national trends.

To compile a representative sample of the different generations of finding aids produced at the Southern Historical Collection, finding aids were selected from older collections that have been reprocessed in the past ten years and collections processed during the 1980s. In the first selection process, finding aids were selected from eighteen collections that have been reprocessed in the past ten years. The majority of these collections were acquired in the 1930s and 1940s, with several acquired in the 1960s and 1970s. They have had multiple additions over the years, making for a wide variety of finding aids produced from the 1930s through 2003. When collections are reprocessed, new updated finding aids are created, but the old ones are often kept, making these collections a rich source for analyzing how descriptive practices have changed over time. The eighteen collections were selected from two lists of older collections that were reprocessed between 1993 and 2003. The first list, generated from a database at the Southern Historical Collection, includes the collections that have been reprocessed and received EAD finding aids that were among the 809 collections represented in the 1940 *Guide to the Manuscripts in the Southern Historical Collection*. The second list includes

collections reprocessed as part of an NEH grant from 1993-1996, and the majority of these collections are not in EAD, but are on the Manuscripts Department website as either ASCII or HTML documents. Only the collections that provided the most representative sample of the different generations of finding aids were included in the study, and these were chosen by examining the administrative control file for each collection.

The reprocessed collections, however, did not have many finding aids produced during the 1980s, because reprocessing efforts focused chiefly on collections with older and more out-of-date finding aids. Thus to obtain a sample of finding aids from the 1980s, a list of finding aids produced from 1980-1990 was compiled from the Manuscripts Department's annual reports. To narrow down the list and to provide insight into the nature of the finding aids available electronically, the collections were viewed online at the Southern Historical Collection's website. Four of the collections had brief summaries referring viewers to the Southern Historical Collection for more complete finding aids. Thirty-three collections had ASCII finding aids that had been created from the original word-processed finding aids, and fourteen had EAD finding aids. Only eleven collections whose finding aids had remained relatively unchanged were used, including the two collections with brief online summaries and nine of the collections with ASCII finding aids. None of the collections that had received substantial additions or EAD finding aids were used in order to collect an unaltered sample of finding aids from the 1980s.

Following the selection process, the finding aids were analyzed to check for consistency within each generation and to pinpoint trends across generations

corresponding to the development of national descriptive practices and standards. The structure, presentation, and content of each generation of finding aid was described in detail in order to illustrate the descriptive practices in use at the Southern Historical Collection over the past seventy years. Examples of finding aids within each generation were then compared for consistency in both the presentation of the structural elements and the actual content contained in those elements. The content and structure of the finding aids were also compared across generations to highlight institutional trends and developments, including both the persistence of traditional practices and the implementation of new procedures. Finally, in order to relate the descriptive practices of the Southern Historical Collection to national trends and developments, the structure and content of the finding aids were compared to noteworthy national guidelines, including the writings of Schellenberg, Gracy, and Miller, and the *EAD Application Guidelines* and the *EAD Tag Library*. These levels of analysis provide insight into the development of descriptive practices for both the Southern Historical Collection and the American archival profession, because the evolution of the department's descriptive procedures mirrors the development of nationally advocated practices, as the profession has become aware of the possibility and desirability of standardizing archival description.

DESCRIPTION AT THE SOUTHERN HISTORICAL COLLECTION

The Southern Historical Collection, located at the University of North Carolina at Chapel Hill houses one of the most prominent collections relating to Southern history and strives “to preserve the priceless sources of Southern history, and to organize, list, and describe the materials so that they are readily available for research.” Formally established by the University in 1930, the Southern Historical Collection was originally comprised of the collections of the North Carolina Historical Society and the acquisitions of University of North Carolina Professor J.G. de Rouhac Hamilton. The founding director of the Southern Historical Collection, Hamilton began actively acquiring manuscript collections 1927, and until his retirement in 1948, he traveled throughout the South soliciting donations of private manuscript collections. Hamilton was so successful in bringing manuscripts to North Carolina from other Southern states that he earned the nickname “Ransack,” and Southern Historical Collection grew quickly, numbering over 800 collections by June 1939.¹⁷

At first, the Southern Historical Collection emphasized acquiring materials over processing them, because, as Hamilton explained to University President Frank Porter Graham in 1937, “The problem of saving was – and is – so much more important than arranging, that chief attention was paid to that.” Simply collecting manuscript materials was not enough, though, because unless these collections were arranged and described, they remained inaccessible to researchers. Hamilton explained to Graham in 1929 that

the library had over 100,000 manuscripts, but they were “stored and unarranged and, for the most part, were inaccessible to investigators.”¹⁸

During the depression, the Southern Historical Collection was able to obtain funding from a variety of relief agencies to begin processing collections. In 1932, the library hired an assistant to begin arranging and describing some of the collections, and in 1933, they received additional assistance to process materials through the Civil Works Administration. According to a 1934 report, relief workers were making progress arranging and filing manuscript collections. They had also begun work on a bibliography of materials relating to the South, a project endorsed by Hamilton.¹⁹

In 1935, the Federal Emergency Relief Act established the Works Progress Administration (WPA), which provided the Southern Historical Collection funding to arrange, repair, copy, and file manuscript collections. The WPA also sponsored the Historical Records Survey, with the aim to promote “the discovery, preservation, and listing of basic materials for research in the history of the United States.” Under the direction of the Historical Records Survey, repositories across the nation could contribute to a national guide to manuscript collections. The Southern Historical Collection began work on the Historical Records Survey in 1936, and in addition to contributing to the national guide, processors worked to complete a guide to the collections at the Southern Historical Collection.²⁰

To promote uniformity in the national guide, the WPA provided survey forms and detailed instructions to use in the description of manuscript collections. The instructions explained how to complete each item in the survey worksheets and provided examples. Dan Lacy, the executive assistant to the Historical Records Survey in North

Carolina, stressed the importance of collection descriptions documenting the types of material, the topics covered, and significant persons in the collection, with the belief that a uniform procedure for description would result in outstanding cataloging.²¹

After processors had begun work on the collection guide, Hamilton noted in 1937 that “while the sorting, pressing, arrangement and filing was slow at first, it is now carried on rapidly and efficiently... Most of these [collections] have been surveyed, calendared, and provided with index cards.” By 1938, over seventy percent of the collection had been accessioned and described. In addition to the survey worksheets, the collections were listed on 3 x 5 cards that included content descriptions, the number of items, dates, prominent subject and names, and the source of the collection. When the WPA discontinued the Historical Records Survey in 1939, work on the guide continued with state funding, and the *Guide to the Manuscripts in the Southern Historical Collection* was published in 1940. It lists alphabetically the 809 collections that were processed through June 1939. Each entry contains the collection name and number, dates, the number of items, provenance information, and a brief contents description.²²

In the mid 1940s, the staff at the Southern Historical Collection established more effective methods for accessioning and processing materials than those used during the 1930s. The new procedures resemble the methods suggested by Schellenberg in his writings of the 1950s and 1960s. Each collection received a permanent call number, and instead of filling out WPA survey forms for each collection, processors completed accession sheets for collections not listed in the 1940 *Guide*. The accession sheets became the primary means of maintaining intellectual control over the collections, and they contained provenance information, the date and terms of acquisition, a brief

biographical or historical sketch of creators, and a preliminary contents description that included the main topics of the collection, the dates and geographical areas covered, and the size. For smaller collections, the accession sheets often provided adequate documentation, but for larger collections, the accession sheets were often accompanied by more detailed surveys. These surveys were not fill-in-the-blank forms like the WPA surveys, but rather they were unstructured descriptions tailored to best fit the needs of individual collections.²³

James Patton, the second director of the Southern Historical Collection, outlined the descriptive practices used in 1949: “We make a general description of the collection – the nature of the papers, and of the business involved, and the history of the chief persons or institutions involved. We make a very limited index of the proper names most dominant – persons, places, institutions, religious sects, also professions and businesses, wars, etc.” In order to stay abreast of new developments, staff members studied the procedures used at other repositories and attended a training session for the care of manuscripts offered at American University in 1945. According to processor Brooke Allan in 1957, the processing procedures then in place had progressed over the years and differed markedly from the procedures used during the WPA years.²⁴

By 1955, the Southern Historical Collection held over 2,500,000 items arranged in over 3,000 collections that included letters, legal documents, diaries, plantation journals, account books, church records, genealogical records, maps, and other miscellaneous materials. A 1955 manual outlines the processing practices of the Southern Historical Collection. When new acquisitions arrived, processors recorded them into an accession book and assigned permanent names and numbers to new

collections. Next, they created a card for the source file, which was arranged alphabetically by donor, and then they filled out an accession sheet for each acquisition. The accession sheet used in the 1950s was the same as the one designed in the mid 1940s and it was the primary method of description. The collections were arranged in chronological order and placed in acid free folders and boxes. The collections were shelved on closed stacks according to the accession number.²⁵

The Southern Historical Collection relied on three primary in-house reference tools in the 1950s. The first was the 1940 *Guide to the Manuscripts in the Southern Historical Collection of the University of North Carolina*, but it only listed collections processed prior to June 1939, so many of the Collection's holdings were not included. Another reference tool was the card catalog, which allowed users to search the collection in several ways. A master file listed each collection by name and included basic descriptive data about the collection, but researchers could also access the collection through a geographical catalog divided by states, a chronological catalog divided into six time periods, and a proper name index listing people and places recorded on the accession sheets and surveys.²⁶

Access to the collection was also available through a series of loose-leaf binders that contained a survey or accession sheet for each collection. For collections listed in the 1940 *Guide*, the binders contained the WPA surveys from which the guide was made, but these older surveys were sometimes accompanied by accession sheets or other updates for recent additions. The 1955 manual explains that for most smaller collections added after 1939, the accession sheet provides enough description, but if "the accession sheet is incomplete, it is replaced as soon as possible by a survey, which describes the

group in greater detail, usually with a chronological analysis. The purpose of the survey is to indicate the research value of the group, showing the more important individuals, places, and activities on which the manuscripts give information.”²⁷

A new survey worksheet was introduced in the late 1950s or early 1960s, but no documentation can be located describing its implementation. Although the presentation differs from the previous accession sheet, the new form contains many of the same data elements. It allows for a provenance paragraph, however, and it has a space for a physical description of the collection. Also, instead of having a place for a preliminary description and a subsequent history, the new form asks for the history and description of contents. Like the older forms, this new form did not specifically indicate the need for a detailed folder or box listing. Detailed inventories were still individualized for each collection and completed on separate sheets.

Throughout the 1960s and 1970s, the Southern Historical Collection continued to use the same in-house reference tools that had been in use in the 1950s. The Collection did periodically contribute to the *National Union Catalog of Manuscript Collections*, which originated in 1959, but not all of the collections met the size and format qualifications for inclusion. However, in 1970, the Southern Historical Collection produced *The Southern Historical Collection: A Guide to Manuscripts* to replace the outdated 1940 *Guide*. The new guide was similar in format to the old guide; each entry contains the collection name and number, dates of the materials, the extent, the states covered, and a brief paragraph describing the contents of the collection which indicates the types of materials, and important people, places, dates, and subjects. The collections are not listed alphabetically, though, but rather they are arranged in collection number

order, with an index to provide name access to the collections. The guide's instructions explain that it can "indicate general holdings on a given topic, but it can not substitute for a personal visit to the Collection to examine the more detailed descriptions and indexes and, of course, the manuscripts themselves."²⁸

Administrative manuals from 1974 and 1975 briefly outlines processing procedures at the Southern Historical Collection, and although they resemble the practices of the 1950s in many ways, descriptive practices evolved over time as archival practices became more refined at a national level. New acquisitions received a permanent name and collection number, or were designated as additions to existing collections. Collections that arrived in an organized state were left, for the most part, in original order, but disorganized collections were chronologically arranged into series. Instead of the accession sheets used in the 1950s, the 1974 manual indicates that processors typed a brief descriptive finding aids (also called surveys) after arranging a collection, and the creation of more detailed description was based on the nature of the collection and staff time. The surveys were not at the item level, but they did indicate items that were shelved separately from the rest of the collection. From these finding aids, processors prepared catalog cards for the departmental catalog, because the collections were still not included in the general library catalog. Entries for collections that met the requirements for inclusion in the *National Union Catalog of Manuscript Collections* were periodically sent to the Library of Congress.²⁹

By 1980, several years after the publication of David Gracy's *Archives and Manuscripts: Arrangement and Description*, the Southern Historical Collection recognized the need to modify its processing procedures. The department expressed the

need for change, indicating that “the survey format used by the Southern Historical Collection for the past fifty years must now change. We can no longer do a complete chronological analysis for each group.” While these sentiments were not new, the Southern Historical Collection began to take action to update its arrangement and descriptive practices, most likely spurred on by Gracy’s guidelines. During accessioning, the department established basic intellectual and physical control over collections by recording pertinent information such as collection name and number, and provenance. However, the bulk of the description was done during processing, not accessioning, like it was in the 1950s when the accession sheet had been the principal finding aid for collections. This separation of processes reflects the practices advocated by the Society of American Archivists.³⁰

By 1981, the department’s finding aids had been revised “to provide greater uniformity and clarity and to conform to national standards insofar as they have been established.” The modified surveys contained a biographical sketch, a scope and content note, series descriptions, and a container list, and extent was now given in cubic feet rather than number of items. In 1982, the department also further refined its finding aids by including information on access restrictions and copyright, shelf lists, and container listings in the series descriptions. The new finding aids made it easier for researchers to access the collections, and a memo from 1989 remarks that the inventories were “more consistent and usable,” and that “many researchers praise the inventories.”³¹

Arrangement practices were also updated during the 1980s, making them more consistent to the processing procedures endorsed in the Society of American Archivist publications. Instead of the old practice of filing collections in one large chronological

run, collections were to be divided into logical series based on the type of material, such as correspondence and financial materials. Moreover, photographs and oversize materials were separated from the rest of the collection in order to best facilitate their special housing needs. The department hoped that the new arrangement practices, along with the detailed container lists and revised collection descriptions would make the collections more accessible to users.³²

In 1982, the Manuscripts Department implemented “levels of processing,” a concept advocated by Gracy. Before processing commenced, collections were accessioned to determine how thoroughly they should be arranged and described. By 1990, the levels had been refined to minimal and full processing. Minimal processing required collections to be screened, arranged, housed, and described “only to the point of basic usability,” and they were cataloged enough to provide “essential access points” Full processing of collections entailed arranging to the folder level, weeding duplicates and ephemeral materials, rehousing all materials in archival containers, and providing conservation treatment when necessary. Fully processed collection received a detailed inventory and thorough cataloging. The processing levels allowed the staff to allocate their time more effectively, instead of dedicating large amounts of time to collections with a low research value.³³

The Southern Historical Collection also began to address the question of automation, realizing the benefits of automating time-consuming processes, such as accessioning and description. The unique nature of archival and manuscript materials slowed the process of automation and the standardization that accompanied it for American repositories, but by 1982, the Manuscripts Department lamented the fact that it

lagged behind other library departments and some of the “more progressive manuscripts repositories” in the area of automation. The department was particularly interested in the possibility of using word processing software to make the creation of finding aids more efficient. After persistent effort to obtain the necessary equipment and training, the Manuscripts Department began producing its first finding aids on a word processor in 1984. As computer technology evolved, the department updated its software from a version of MultiMate, to Word Perfect, and finally, Microsoft Word.³⁴

Automation not only assisted in the preparation of finding aids, but it also revolutionized the cataloging of manuscript materials. The 1983 development MARC-AMC, a standardized format for cataloging archival and manuscript collections, not only prompted the department to automate its cataloging, but also allowed the department to contribute cataloging records to the national electronic database, OCLC. By 1985, the department was planning to implement MARC-AMC, realizing that even though it would not immediately benefit the collection, over time use of MARC-AMC could improve access to manuscript materials, making them available through a national online database. In 1986, the Manuscripts Department had its first OCLC profile approved and input twenty records in the MARC-AMC format. Over the next few years, work continued to refine the process of creating MARC-AMC records, but until the department received a grant for cataloging the collections in the early 1990s, few new records were added to OCLC. Although MARC was an important development that increased the accessibility of collections, it was not considered as a substitute for finding aids, which contained much more thorough and detailed information about the contents of collections.³⁵

Throughout the 1980s and 1990s, the department drafted and revised several processing manuals to incorporate new arrangement and descriptive practices as they developed. Intent on maintaining its reputation as a prominent and progressive manuscript repository, the Southern Historical Collection made a committed effort stay abreast of new developments in the field. These manuals reflected the principles advocated by Gracy in the 1980s and by Miller in his 1990 SAA publication, *Arranging and Describing Archives and Manuscripts*. Although the department tailored the SAA guidelines to best fit its needs, Gracy and Miller both had a large impact in shaping the descriptive practices at the Southern Historical Collection.³⁶

Even though the Southern Historical Collection had revised the finding aids it created for newly processed collections to comply with the Society of American Archivist guidelines, many finding aids for older collections remained outdated. The diversity of these finding aids and the inconsistent quality of the description was problematic and hindered access to those collections. In 1987, the Southern Historical Collection had over 1,500 feet of materials that were “described so poorly that use is discourage and if attempted, unacceptably difficult.” As the department maintained in 1986, these collections, which had been “arranged and described by untrained WPA workers, packaged in acidic containers, and heavily used for more than forty years” needed to be reprocessed “according to current archival standards.” The department wanted to rearrange the collections into series, rehouse the materials in new acid free containers, and update the bibliographic descriptions of the collections to make them more accessible to researchers, but it lacked the resources to undertake such a large retrospective processing venture.³⁷

A series of grants and projects completed by the department in the 1990s facilitated the reprocessing of many older collections. In 1991, the department began work on an eighteen-month U.S. Department of Education Title II-C Cataloging grant to create 2,700 MARC records in OCLC. Not only did the grant assist the Southern Historical Collection in cataloging a sizable amount of its collections, but it also helped the department to update older finding aids and improve its card catalog. Catalogers had to write abstracts for each collection for the MARC records, and when included in finding aids, these abstracts greatly improved collection-level description. After cataloging collections in MARC, the department was also able to submit records to *Nation Union Catalog of Manuscript Collections* for collections that had never before been included. The Southern Historical Collection also completed a microfilming project for the University Publications of America (UPA) series “Records of Ante-bellum Southern Plantations” and “Southern Women and their Families in the 19th Century,” in which numerous collections were reprocessed and given updated finding aids and MARC records. Because of a departmental policy of filming only complete series or subseries, many collections had to be rearranged into series and redescribed in order to select materials for microfilming.³⁸

In the early 1990s, the Manuscripts Department received an NEH Preservation Grant to rehouse and microfilm collections and to create MARC-AMC records. Similar to the UPA microfilming project, many of the collections involved in the NEH grant had to be reprocessed. Electronic summaries of these collections were also produced as part of the grant project. The summaries were derived from the MARC records, and they contained the main entry, the title, collection number, extent, an abstract, and an

abbreviated container list. Often the summary for a collection was printed and placed alongside the inventory for that collection in the binders of finding aids available for public use. While the summaries were useful resources, they were not substitutes for the actual finding aids. In 1993, the department received another NEH grant for “Accessing the American South,” a two-year project to arrange, describe, and catalog twenty-four important collections from its backlog. Although some of the collections were recent acquisitions, many were older collections that needed to be reprocessed. Processors arranged collections into series and created detailed finding aids in Microsoft Word, applying Miller’s guidelines. Many of the collections analyzed in this study were reprocessed as a part of this grant project.³⁹

These projects helped the Southern Historical Collection further refine its “internal descriptive standards” and make them compatible with the national guidelines. Since MARC records for new collections were derived in large part from finding aids, the finding aids were updated to contain the data elements necessary to create MARC records. In 1993, the department’s annual report remarks on the progress made on updating its collections: “over the past six years, we have rehoused and improved finding aids to our pre-1980 accessions and...entered records of all our significant processed holdings into local and national online databases.”⁴⁰

In addition to using automation to streamline description processes, the Manuscripts Department desired to provide electronic access to its collections, and by 1995, the majority of the Southern Historical Collection’s holdings were represented in the UNC library’s online catalog. The department stopped adding new records to the card catalog in 1995, but it was not removed from the search room until 2001. In

addition to the online catalog, the department was also interested in making the finding aids available online in order to increase accessibility. The Manuscripts Department established an internet presence in the mid 1990s, and in 1993, it placed its first finding aids online in ASCII text. In 1994-1995, Southern Historical Collection finding aids in ASCII text were migrated from the library's gopher site to the World Wide Web. Work continued to mount all finding aids that were in machine-readable format on the web, and the department began to explore the possibility of converting older finding aids into electronic documents. In 1995-1996, a total of 338 finding aids were loaded onto the Manuscripts Department website, and bringing the total to 1,200. Most of the online finding aids were in ASCII text, but by 1996, several had been encoded in HTML.⁴¹

The development of EAD in 1996 had a significant impact on the creation of finding aids for Southern Historical Collection materials, the full extent of which is yet to be realized. In keeping with its position as a leading manuscripts repository, the Manuscripts Department began looking into implementing EAD soon after it was developed, and the first EAD encoded finding aids were posted to the departmental website in 1998. Although the contents of the finding aids did not dramatically change in the conversion to EAD, the content elements became standardized, and EAD provided a standardized structure for finding aids that provided a navigable, searchable, and user-friendly finding aid. Because not all browsers had the capability view SGML pages, the EAD finding aids were made available in both SGML and HTML, and in the first years of its use, the SGML could be viewed through a Panorama Viewer.⁴²

At first, processors created finding aids in Microsoft Word, as they had been doing before EAD, and then they converted them to EAD with templates and Word

macros. Version 1.0 of EAD, which worked as both an SGML and an XML DTD and incorporated the “enhancements requested during experimentation with the ‘beta’ test version of the EAD DTD,” became available in 1998, and the Southern Historical Collection made preparations for that transition later that year. By 2001, processors encoded finding aids directly into EAD using Notetab software, and the department was working to migrate existing EAD finding aids from SGML to XML. The department also was preparing for the conversion from EAD Version 1.0 to EAD Version 2002.⁴³

In addition to the implementation of EAD in 1998, other advances were made in providing access to the collections. Collection records in the library online catalog were linked to the finding aids on the department website. Also brief summaries were created in HTML for collections that did not have electronic finding aids. These summaries are derived from the MARC records and contain the collection name, number, dates, extent, type of accession and date, a brief abstract, online catalog terms, and a copyright disclaimer. These summaries refer users to the complete finding aids located in the search room at the Manuscripts Department. As of yet, not all of the Southern Historical Collection’s finding aids are available electronically, but when collections without electronic finding aids are reprocessed, new finding aids are created in EAD. By September 2003, 4,146 of the 4,604 collections comprising the Southern Historical Collection and the General and Literary Manuscripts were accessible via the Manuscripts Department’s website. Detailed inventories were available for 1,565 of those collections, while summaries were available for 2,581 collections. During the Southern Historical Collection’s 70th anniversary in 2000, the department celebrated the progress made in its descriptive practices, advancing from the WPA inventories to EAD finding aids.⁴⁴

INFLUENTIAL NATIONAL GUIDELINES

Since the 1930s, several sets of guidelines that have influenced the national archival community have also affected descriptive practices at the Southern Historical Collection, which looks to outside developments and publications to stay abreast of national trends and to improve its processing procedures. Because the descriptive guidelines before EAD are only suggestions for best practice and not prescriptive standards that archivists have to adhere to, many repositories, including the Southern Historical Collection, have adapted the guidelines to fit local practices and traditions. Until the mid 1970s and the possibility of automation, the profession held on to the idea that the unique nature of manuscript collections made the standardization of finding aids unfeasible. Thus, while the processing guidelines described below have greatly influenced archival practices across the nation, they do not carry the authority of standards. However, in order to understand the relationship between the evolution of national descriptive practices and changes in the content of finding aids at the Southern Historical Collection, it is necessary to explore the most influential guidelines.

The first guidelines that impacted the Southern Historical Collection were the Works Progress Administration survey forms and instructions for the Historical Records Survey in 1936. Because the WPA sought consistency in the collection surveys repositories contributed to the Historical Records Survey, their instructions were more rigid than later guidelines. Following the WPA survey project, one of the most influential figures in the archival profession from the 1940s and 1960s was T.R.

Schellenberg, who wrote *Modern Archives: Principles and Techniques* in 1956, and his primary work, *The Management of Archives*, in 1965. His work was more theoretical in nature than the WPA instructions because he sought to educate archivists on the proper archival theories, not simply indicate how to properly fill out survey worksheets.

However, Schellenberg did explicitly indicate the elements necessary to create a good finding aid. Although no direct link can be made between Schellenberg and the Southern Historical Collection's descriptive practices, his influence was widespread and the Collection did alter its finding aids from the WPA surveys in the early 1940s and then further reformed them several years later.⁴⁵

The next set of guidelines to influence descriptive practices nationally and at the Southern Historical Collection was David Gracy's *Archives and Manuscripts: Arrangement and Description*, first published by the Society of American Archivists in 1977. In his work, Gracy incorporated updated theories on arrangement and description, and provided succinct instructions for processing collections and creating inventories and other types of finding aids. He also endorsed the inventory as a reference tool for users, not merely as a tool for maintaining internal control over collections as earlier guidelines had done. In the late 1970s and early 1980s, Southern Historical Collection revised its processing practices, bringing them more in line to the practices advocated by Gracy.⁴⁶

In 1990, the Society of American Archivists published Fredric Miller's *Arranging and Describing Archives and Manuscripts*, the next set of processing guidelines to impact the archival community. Miller's work is similar in nature to Gracy's, but it devotes more coverage to technological developments, such as MARC-AMC. Miller advocates many of the same finding aid elements as Gracy, but he does add some elements to make

it easier to derive MARC records from finding aids. Miller greatly influenced national practices and description at the Southern Historical Collection, and his impact can still be felt because the elements he recommends for finding aids are used in Encoded Archival Description (EAD). The latest set of guidelines to greatly influence descriptive practices is EAD, which actually is a descriptive standard to regulate the structure of encoded finding aids. EAD takes the finding aid elements suggested by Miller and provides a format to assist archivists in producing structurally consistent finding aids, and it has been embraced by repositories across the nation, including the Southern Historical Collection.⁴⁷

Although archivists have produced other guidelines for archival description, the ones mentioned above have been the most influential, and a detailed analysis of their procedures for creating finding aids will provide the context for the history of descriptive practices at the Southern Historical Collection, beginning with the WPA Historical Records Survey. The Works Progress Administration was created in 1935 to provide relief during the Great Depression, and it sponsored the Historical Records Survey to inventory historical primary source materials throughout the United States. Manuscript repositories participating in the Survey processed collections and sent completed survey forms to the Manuscripts Division of the Library of Congress for inclusion in a national guide to manuscript collections. The Southern Historical Collection began participating in the Historical Records Survey in 1936, and the completed survey forms were not only sent to Washington, D.C. for inclusion in the national guide, but they also made the basis for the repository's 1940 *Guide to the Manuscripts in the Southern Historical Collection*.⁴⁸

Under the guidance of T.R. Schellenberg, the WPA provided detailed survey forms and instructions to assist in the processing and description of manuscript collections to help ensure consistency. These forms and guidelines were revised several times throughout the duration of the Historical Records Project, as the WPA sought to clarify processing procedures. The instructions led processors, who often had little training in archival work, through the survey worksheet item by item, explaining how to complete each element of the survey form. For example, the instructions for filling out the collection name specify that “the exact name of the collection should be given in quotation marks,” and if the collection is named for a donor who is not the primary subject, the main subject should be given in parenthesis, such as “Henry Stevens Collection” (Benjamin Franklin).⁴⁹

The 1936 WPA survey worksheet, entitled the Manuscripts Collection Form, is a single page, fill-in-the blank form that processors used to record pertinent information about collections. Below the WPA heading are spaces to indicate the location of the repository. This is followed by collection information including collection name, inclusive dates and total numbers, missing materials, size, location by dates and units, history of the collection, and analysis of the contents. The 1937 Manuscripts Collection Form Revised contains two pages of fill-in-the-blank elements and focuses more on administrative control than the 1936 form. It documents relevant administrative information including the processor’s name, the date, and the repository name, identification number, and location. The middle of the worksheet is reserved for collection-related information including collection name, dates, quantity, location and physical condition, a brief description, the importance of the materials, principal persons

mentioned, history of the collection; and noteworthy gaps. The end of the form contains information used for internal control purposes, such as conditions of access, percentage of the collection arranged and the manner of arrangement, the percentage cataloged and the number and type of catalog cards, a list of other finding aids, and the method of copying if the material is not original.⁵⁰

Following the Historical Records Survey, Schellenberg had a distinguished career at the National Archives, where he refined his theories on archival practice from the 1940s through the 1960s. Schellenberg's writings on archival principles, especially his 1965 *Management of Archives*, focus on educating archivists on the theoretical and practical aspects of archival practice, including arrangement and description. Whereas the WPA instructions had a specific purpose—assisting processors with limited archival experience in filling out survey worksheets for a national manuscripts guide, Schellenberg's writings were intended to provide archivists with an educational foundation with which to pursue their career, and his work had a greater impact in shaping the course of archival description over time. *The Management of Archives* provides both theoretical explanations and instructions for compiling inventories, catalogs, and other descriptive tools. It lists the elements which should be included in inventories and provides examples, but unlike the WPA with its survey worksheet, no specific format is specified. Perhaps this lack of a specified worksheet prompted repositories, including the Southern Historical Collection, to design their own inventories and thus furthered the localization of descriptive practices.⁵¹

In *The Management of Archives*, Schellenberg devotes an entire chapter to the preparation of inventories for manuscript collections. He recommends that processors

begin an inventory worksheet for each collection during accessioning, and then provide more detailed descriptions of the contents during processing. Also, Schellenberg maintained that inventories be used for internal control purposes, while catalogs, guides and other tools should serve as the primary means of access for researchers. As he explained, “an inventory of private papers should, however, serve as a means toward the end of establishing bibliographical control over the holdings of a particular repository, but this control should be in the form of catalogs and guides.” Schellenberg breaks up his inventories into two parts, the first of which is an “Analysis of Provenance,” containing either a biographical sketch or administrative history of the creator. The biographical sketch should document the main activities of the person, including important dates, names of family members, and career highlights. The Biographical sketch should also list the places, dates, and other people involved in the creation of the records. Administrative histories should record important persons, places, and dates, and chronicle developmental highlights and other information documenting the nature and purpose of the organization.⁵²

The second element of Schellenberg’s inventory is the “Analysis of Records,” which contains administrative control information and a description of the collection’s contents. Administrative control information includes the collection name and number, provenance information, the types of records and whether they are originals, inclusive dates, extent in linear feet and number of items, the states to which the collection relates, the primary subject, and the chronological period to which the collection belongs. The Descriptive information outlines the functional origins of the materials, the subject

matter, important names and places, provenance and terms of access, and references to other finding aids concerning the collection.⁵³

Although Schellenberg's archival theories remain influential, archival theory and practices have continually evolved, and in 1977, the Society of American Archivists published David Gracy's *Archives and Manuscripts: Arrangement and Description* as part of its Basic Manuals Series. Gracy's work provides the fundamental "building blocks" of archival arrangement and description for repositories to mold into workable processing procedures suited to their own needs, for as he explains, "The kaleidoscopic variety of systems of archival endeavor in North America developed not because each archivist deliberately set out to create an esoteric system. Rather it represents the application of the basic rules of archival enterprise to the situation of time and place." Designed as both for educational purposes and on-the-job consultation, Gracy's work focuses primarily on archival description theories and practical applications, whereas Schellenberg's lengthy treatise provides insight into the whole of archival practice. Like Schellenberg, Gracy outlines the essential elements of the finding aid, and provides examples, but leaves the presentation up to the individual repository.⁵⁴

Gracy's format for inventories is based on the Society of American Archivists' 1976 *Inventories and Registers: A Handbook of Techniques and Examples*, and it more closely resembles the finding aids of today than did the inventories recommended by Schellenberg. The inventory format recommended by Gracy contains seven basic elements, the first of which is an introduction that contains administrative control information such as a contents overview, provenance, research strengths, and access restrictions. The introduction is followed by a biographical sketch/agency history, which

provides background information about the person or agency responsible for the creation of the collection, in either a narrative form or an outline. Next is a narrative scope and content note that includes information on the types of material, inclusive dates, bulk dates, significant correspondents and subject files. The scope and content note should also indicate the extent, depth, and strengths and weaknesses of the collection. The fourth element is the series description, which “demonstrates the actual arrangement of the collection/group, listing each series in order with a precise review of the files within it,” and includes the series title, inclusive dates, extent, types of material, arrangement, and principal subjects. For large collections, the series description can also include a mini scope and contents note recording “pertinent data on the administrative origins of the series and the functions or activities to which the series relates.” Following the series description is a container listing at either the box or folder level. The sixth and seventh elements, which are an index and a preface explaining the repository’s finding aid policy, are optional.⁵⁵

In 1990, the Society of American Archivists published Fredric Miller’s *Arranging and Describing Archives and Manuscripts* as a part of their new Archival Fundamentals Series. Similar in many ways to Gracy’s *Archives and Manuscripts: Arrangement and Description*, Miller’s work also aims to serve as both an educational tool and a reference for archivists to use while processing, and both works view inventories as internal control documents and research tools for users. Moreover, Miller recommends many of the same elements for inventories suggested by Gracy. Miller does incorporate new developments in the profession, though, most notably MARC-AMC as a cataloging standard for archival materials. Miller also includes a chapter on descriptive standards, reflecting the

archival profession's increasing interest in standardization following the success of MARC-AMC. Inventories are not covered in the chapter on descriptive standards, however, because they still were not standardized with "unique descriptions for each set of records according to rules and procedures that are explicit, consistent, and comprehensive." Guidelines for archival description existed, but they were not standards.⁵⁶

Miller's format for finding aids closely resembles the structure used today in Encoded Archival Description. The first element is a title page containing the collection name and number, and the name and address of the repository. This is followed with a table of contents, an introduction to the repository, an acknowledgment of donors, a listing of staff involved, mention of any financial support, and a foreword highlighting special features of the finding aid and how to use it. An abstract then summarizes the provenance, contents, extent, dates, types of materials, and any user restrictions. The introductory information is followed by an agency history/biographical sketch outlining information about the creator that is important for understanding the collection. The scope and content then provides a summary description of the collection, including the overall arrangement, dates, major subdivision, the availability of copies, notable processing decisions, and any pertinent information on how the records were generated, used, and maintained. The series descriptions are the next element. Each series description contains a title area with the series number, the title, dates, extent, and physical format. The title area is followed by a summary of the functions documented in the series and a description of the arrangement, any subseries, the physical condition of the materials, the existence of copies, access restrictions, strengths and weaknesses of the

collection, closely related records, and notes on creator-generated finding aids. After each series description is a container listing that records the collection number, title, dates, and container number for all of the containers in a particular series. Any items that have been separated from the collection are listed at the end of the finding aid, along with a shelf list for staff copies, and any indexes or appendices.⁵⁷

In 1996 the Berkeley Finding Aid Project developed Encoded Archival Description as a standard for the structural elements of finding aids. The use of MARC-AMC as a cataloging standard prompted archivists to explore the idea of a descriptive standard for finding aids, because although standardized catalog records did enhance access to manuscript materials, they were not suited to handle the amount of descriptive information contained in finding aids. EAD was the first American standard for the creation of finding aids, and although it does not standardize the content that archivists place in the structural elements, it does provide a consistency among the finding aids of various institutions that was not present in the earlier guidelines. Whereas the guidelines served as examples of best practice that repositories could adopt and adapt at will, EAD provides a more rigorous structure, even though it does allow for flexibility in the level of encoding. Because EAD is a standard and repositories have to adhere to specific elements, the archival profession has placed a greater emphasis on workshops and hands-on training, with written guides intended to supplement such training.⁵⁸

The two most noteworthy manuals on EAD are the 1998 *Encoded Archival Description Tag Library, Version 1.0* and the 1999 *Encoded Archival Description Application Guidelines, Version 1.0*, both of which are published by the Society of American Archivists and are available on the Library of Congress's website at

<http://lcweb.loc.gov/ead>. The *Application Guidelines* provide an overview of how to implement EAD, addressing the issue from an administrative, technical, and archival perspective. The *Guidelines* do not attempt to regulate the content of EAD, and they also do not “legislate specific encoding practices, because current international descriptive practices are divergent enough to make hard-and-fast rules impractical. Rather, the *Guidelines* illustrate and discuss the pros and cons of various options.” The *Tag Library* complements the *Application Guidelines*, providing an overview of the tagging structure and a detailed listing of all of the tags and their appropriate uses. When used together, the *Application Guidelines* and the *Tag Library* provide archivists with an outline of the tagging structure needed to create EAD-compliant finding aids.⁵⁹

EAD finding aids are comprised of two segments: one with “information about the finding aid itself,” containing the EAD Header and the Front Matter, and another segment with information about the collection, called the Archival Description. The EAD Header is made up of a unique EAD Identifier and a File Description, which contains “bibliographic information about the finding aid, including the name of the author, title, subtitle, and sponsor, as well as the edition, publisher, series, and related notes,” the Profile Description that notes the language of the finding aid and information on who encoded it and when, and the Revision Description. These EAD Header elements must appear in a particular sequence to “ensure uniformity across finding aids.” To compensate for the rigid structure of the EAD Header, the Front Matter element can be used to create a title page, preface, and/or dedication, thus giving repositories a degree of flexibility in the format and presentation of their finding aids.⁶⁰

The Archival Description segment hierarchically organizes information about a collection into component levels to accurately reflect the arrangement of a collection into series, subseries, and containers. The component level indicates which level is being described, and information is inherited from one level down to the next. For example, information describing the collection is inherited at the series level, and series information is applicable at the container level. The Descriptive Identification contains descriptive information at each component level and is considered “to be among the most important for ensuring a good basic description of an archival unit or component.” The Descriptive Identification can be used at the collection level and then repeated for each series and subseries. Elements in the Descriptive Identification include the container; origination, or who is “responsible for the creation or assembly of the archival materials;” a physical description noting the extent, dimensions, format, and physical characteristics of the material; the physical location; repository; date of the unit; collection number; and title of the unit; abstract; and any notes. Unlike the EAD Header, which has a prescribed structure, the Descriptive Identification is flexible. Not all of the elements have to be used, and they can be listed in any order.⁶¹

In addition to providing Descriptive Identification at the collection level, archivists can include additional elements to provide a fuller description of the contents and context of the collection as a whole. These elements, many of which are traditionally found in finding aids include the biographical/ historical note, the scope and contents note, an organizational outline, a note on the method of arrangement, controlled access headings, and administrative information. The administrative information “designates facts about provenance, acquisition, access, and reproduction restrictions,” and may

contain the following subelements: access restrictions, accruals, acquisition information, alternative forms available, appraisal information, custodial history, notes, preferred method of citation; processing information; use restrictions.⁶²

After providing the Descriptive Identification and other essential elements for the collection as a whole, the series, subseries, and containers are described in Description of Subcomponents. Once a component level has been selected, archivists can enter Descriptive Identification information for that level, and any additional elements, including administrative information, a biographical/historical sketch, controlled access headings, a scope and contents note, an organizational note, a container listing, other descriptive data, and adjunct descriptive data. The element other descriptive data is used to assist archivists in converting older finding aids into EAD by providing a place to include information that does not fit into EAD's structure. Adjunct descriptive data is "designed to encode supplemental descriptive information that facilitates use of the materials featured in the finding aid," and includes elements for a bibliography, index, note, file plan, other finding aid, related material, and separated material. EAD allows repositories a great degree of flexibility to determine the level of encoding. Some repositories may choose to include many of the elements listed about in their finding aids in order to produce detailed descriptions of their collections, but other institutions may choose not to employ such thorough encoding, but still produce informative and usable finding aids.⁶³

ANALYSIS OF FINDING AIDS

Over the past seventy years, the Southern Historical Collection has used over seven different varieties of inventories, or finding aids. An analysis of the changes in the content and structure of these finding aids sets the context for several comparisons. Finding aids of the same generation are compared for consistency and continuity. Are the same elements used in the same manner? The finding aids are also compared across generations to illustrate changes in content and structure over time. Are new elements introduced, and how does the use of existing elements change? Finally, the finding aids are compared to the relevant national guidelines to determine the degree to which they conform to national descriptive trends. How do the finding aids adhere to the nationally recommended guidelines and how do they differ? The complete analysis shows the evolution of Southern Historical Collection finding aids in relation to the development of national descriptive practices.

The survey worksheets for the WPA's Historical Records Survey were the first finding aids used at the Southern Historical Collection from 1936 through at least 1940. In addition to providing a structured worksheet, the WPA also created explicit instructions to assist processors in describing collections. Although the Southern Historical Collection had to follow these instructions to be included in the national listing of manuscripts collections, discrepancies between the instructions and Southern Historical Collection practices are evident. Moreover, even though the forms were for the most part completed in a consistent manner, it is clear that certain aspects were

individualized to fit the needs of the collection. The WPA issued two versions of its survey forms: the 1936 Manuscript Collection Form, and the 1937 Manuscript Collection Form Revised. An example of the 1936 inventory is located in Appendix B and a sample of the 1937 inventory is located in Appendix C. The 1936 form was one page in length and contained information about the repository and basic descriptive information about the collection. The revised 1937 form was two pages long and contained, in addition to the repository and descriptive information, administrative elements for documenting the processing history of the collection. Of the eighteen reprocessed collections surveyed for this study, ten had 1936 survey forms, and two had the 1937 survey form.

The elements of the 1936 survey form are listed in the section of this paper concerning national guidelines, and an example is included in the appendix, therefore, the structure of the form will not be repeated here. In nine of the ten surveys under examination, all of the repository and descriptive elements are completed except for the physical location and size of the materials, and missing material is indicated only when relevant. The location of the repository, the collection name, dates, extent, and content analysis are all provided. The extent of the collection is listed in the element for inclusive dates and total numbers, not in the element for size, and it is accompanied by a note concerning the arrangement scheme: “uncalendared –chronological.” Processors also added the collection number in the upper right corner of the survey, and the primary geographic location of the collection was added after the collection name. The history of the collection is provided in all but one instance, when it was unknown.

The elements of the revised 1937 form have also been listed in the previous section, and an example has been provided in the appendix. Similarly to the 1936 form,

in the 1937 revised survey all of the repository elements and descriptive elements except for location/physical condition, importance of the collection, and gaps in coverage have been completed. The quantity element also includes information on the arrangement method (uncalendared and chronological) and the types of materials, along with filing locations. The collection number has also been added in the upper right corner of the first page, however, unlike the 1936 survey, the 1937 form includes elements for who processed the collection and the date of processing. The form also contains an element for listing people documented in the collection. The administrative elements on the second page have all been left blank, except in one instance the percentage arranged and the number of catalog cards has been provided.

For both versions of the WPA Historical Records Survey worksheet, the contents description provides a listing of the types of materials, and important persons, locations, dates, and subjects covered in the collection. The depth and quality of these descriptions vary, but this discrepancy does not appear to be related to the size of the collection. Two of the collections number under fifty items, and the other ten collections are large, numbering from 250 to 40,000 items. The two small collections have brief descriptions that do not require additional pages, but they are not necessarily more or less detailed than the descriptions of the larger collections. Eight of the ten large collections have lengthy descriptions requiring multiple pages. The majority of these descriptions are similar in structure. The additional pages have no identification and the descriptions are dense, single-spaced sentence fragments with no paragraph breaks. However, some of the descriptions are double-spaced and divided into paragraphs, making them easier to use, and one contains a chronological listing of correspondence. The descriptions written

using the 1936 form often include a listing of important correspondents. Except for important items worthy of mention, none of the twelve descriptions are at the item level. Instead, they provide a general overview of the contents. The arrangement of the collections contributes to the awkwardness of the descriptions. The collections were arranged chronologically, and not grouped into series, and thus the descriptions attempt to relate the contents of the entire collection without grouping them according to function.

The completed survey forms conform to the instructions provided by Dan Lacy, the executive assistant for the Historical Records Survey in North Carolina in 1936, and by the WPA in 1937. Dan Lacy indicates that the size and location elements did not have to be completed in the 1936 form, and the contents descriptions written by processors at the Southern Historical Collection closely resemble Lacy's examples. However, although the repository followed WPA regulations, the surveys remain individualized, tailored to fit the unique needs of each collection. The use of the history of the collection element illustrates a lack of consistency. The instructions indicate that purpose of the history of the collection element was to provide biographical information on the creator and provenance information. However, the Southern Historical Collection was not consistent in its use of the element. In six instances the element contained only biographical information, three surveys contained both provenance and biographical information, and two listed only provenance data. Additionally, one survey differed significantly from the others, but it was completed in 1943, three years after the publication of the 1940 collection guide. None of the repository information is completed, and the extent is listed under the size element, rather than the inclusive dates

and total numbers element. On the whole, the WPA surveys are consistent in structure and content, but they also accommodate the unique nature of manuscript collections.⁶⁴

The next inventory format used at the Southern Historical Collection was introduced as early as 1940, and it was used at least through 1944. After the termination of the Historical Records Survey and the publication of the collection guide in 1940, the Southern Historical Collection changed its inventory format, although there was likely some overlap between introducing the new form and terminating use of the WPA form, because the WPA form was used as late as 1943. The new form was entitled “Collection Record,” and it appears to be an accession worksheet that also served as a finding aid. It is one page in length, but was often accompanied by additional pages of descriptive information. The top of the form contains a heading with the repository information, followed by the date of accession and the collection name. Provenance information is listed next, and includes who gave the materials, the date the Southern Historical Collection received them, the date the donor agreement was filed, and the number of copies. This is followed by spaces for listing the contents of both manuscripts and books, their temporary and permanent locations in the library, who surveyed them, the extent, and if they were registered in the guide. The final element is for remarks. An example of this finding aid is located in Appendix D.

From the eighteen reprocessed collections, thirteen examples of this Collection Record survey form were found, with some collections having more than one example. Processors were not as consistent in completing these inventories as they were for the Historical Records Survey, perhaps because the Collection Record was not accompanied by explicit instructions imposed by an outside agency. For example, some of the

elements are consistently completed, including the accession date, collection name donor name, donation date, and the contents description, while other elements were not completed with regularity. Items that are frequently completed include the temporary location of the collection, the survey information, and the remarks. The permanent location is provided in one survey and the number of copies and registered in guide elements are not completed at all. Because the form provides no clear place to record the extent of the collection, it is sometimes indicated in the contents description and/or the survey information. The form also does not include elements for the collection number, inclusive dates, and geographic locations, and this information has been added to the top of ten of the surveys. The remarks usually contain additional descriptive information, but they also sometimes include administrative information concerning mergers or filing instructions. When provided, the temporary location for manuscripts is often listed as “manuscripts department,” but the location for books is more specific. The majority of these surveys are for additions to existing collections, but this is only indicated on five of the thirteen finding aids.

The survey form does not provide much space for a contents description, and four of the six collections numbering over a handful of items have additional pages of contents descriptions. The collections without additional pages of descriptive information contain very brief content descriptions that sometimes only indicate the type of material, but they can include dates, people, and subject. In six instances, additional descriptive information is provided in the remarks element. For the four collections with additional pages of description, these sheets follow two formats. Two of the finding aids have additional pages following the same format. They are entitled “Manuscripts

Collection Survey,” and contain the collection name, inclusive dates, number of items, history of the collection, contents description. Two other finding aids have additional pages that resemble the WPA forms, but were typed on blank paper instead of the official WPA worksheet. These contain the same repository information as the WPA forms, along with the collection name, geographical area, inclusive dates, extent, collection history, and contents description. The additional sheets are not dated, and although they were most likely created along with the Collection Record, they could have been created at a later date. These descriptions vary in depth, but they all include information on the types of material, and important people, dates, locations, and subjects. Two of the descriptions also include brief biographical statements.

The Collection Record form was not used for many years, perhaps because it was not well-suited for collection descriptions. The Southern Historical Collection introduced a new inventory form in the mid 1940s that focused more on contents descriptions than location and processing information. This new and improved form was used from at least 1946 through 1969, with slight modifications made 1948 and 1949 to include spaces for the states, dates, and extent in the upper right corner. This form is likely the result of the Southern Historical Collection’s attempt to establish more effective methods for describing collections in the mid-1940s. This form was used both as an accession sheet and as the primary finding aid for the collection. For smaller collections it provided an adequate amount of description, but for larger collections, it could be supplemented with additional pages of descriptive information. A sample of this finding aid is located in Appendix E.⁶⁵

At the top of the form, the heading with the repository name is followed by the accession date and number, relevant states, inclusive dates, and extent. This is followed by provenance information that documents the type of acquisition, name and location of the donor, and the date and method of arrival. Next is the preliminary description, and finally, the subsequent history, which includes administrative notes concerning mergers, filing instructions, processing notes, and photocopying instructions. It is unclear if the subsequent history was filled in when the rest of the form was completed, or if it was filled in at a later date when the collection was moved, merged, or rearranged.

Thirty examples of this finding aid were found among the eighteen reprocessed collections, dating from 1946 through 1969. Although they do not all indicate this, only one of these finding aids is for a new collection, the other twenty-nine are for additions to existing collections, however this fact does not appear to affect the level of description. In these finding aids, all of the elements are completed, except for twelve occasions when the states, dates, and extent were not completed. Also in three instances, the date of the accession was not completed. For the earlier forms that did not have collection dates, states, and extent, these were written in the upper right corner. The subsequent history includes a variety of administrative notes concerning mergers, filing instructions, processing notes, and photocopying instructions. It is unclear if the subsequent history was filled in when the rest of the form was completed, or if it was filled in at a later date when the collection was moved, merged, or rearranged.

The preliminary descriptions vary in their depth and treatment of the collections. Eight of the finding aids have multiple pages of descriptive information, while twenty-two do not. The contents description is sometimes accompanied by a brief

biographical sketch, or at other times biographical data can be included in the description, but some collections contain no biographical information. Several boxes of materials can be described in a single paragraph or that description can be several pages in length, but collections numbering fewer than ten items typically have a brief descriptive paragraph treating the materials at the item level. For the larger collections described in a few lines, this provides only the most general overview of the collection. Of the thirty finding aids, eight have additional descriptive information, and twenty-two do not. The twenty-two brief descriptions contain information on the types of material and important people, dates, subjects, and geographical locations. For the eight finding aids with multiple pages of descriptive information, the contents description is largely unstructured, but the additional pages do include a heading with the collection name and number, dates, states, and date processed. Unlike the WPA surveys where the description consisted of a typed page with no formatting or breaks, these descriptions have been broken into paragraphs or lists organized chronologically, making them much easier to follow. These descriptions document the types of material found in the collection, along with notable people and places, important dates, and significant subjects. Many of the narrative descriptions are accompanied by lists of correspondence or volumes that can provide a more detailed glimpse into the contents of a collection.

This finding aid format was designed and used in the 1940s during the height of Schellenberg's career, and his book *The Management of Archives* appeared in 1965, while this form was still in use. Although no direct reference is made between this finding aid and the practices espoused by Schellenberg, beginning in the 1940s, the Southern Historical Collection began to look outside for new developments by examining

the procedures at other repositories and attending training sessions. However, this form predates Schellenberg's most influential publications, so his influence here is questionable. Thus it should come as no surprise, that while the finding aid does include some of the elements recommended by Schellenberg, it does not follow his format very closely. Although the finding aid includes the collection name and number, states represented, inclusive dates, extent, acquisition information, type of material, and usually notable persons, dates, and subject covered in the collection, all of which are recommended by Schellenberg, these are also elements that were present in the WPA worksheets of the 1930s. Schellenberg did play a large role in the development of the instructions for completing the WPA surveys, though, and the Southern Historical Collection retained aspects of the WPA survey worksheets as it designed new and updated inventory formats. The exact sources that influenced this finding aid cannot be determined, but it was most likely a mixture of carryover from the WPA surveys and new ideas gathered during interaction with other members of the archival profession.⁶⁶

In the late 1950s, the Southern Historical Collection introduced a new survey form. Use of this survey overlaps with the previous form, which was used as late as 1969, and it is not clear what factors prompted the use of one form over during processing. Although the presentation of the new form differs from the older version, the data elements and their contents are similar. Beneath the repository heading are the collection name, number, inclusive dates, and states represented. This is followed by a brief physical description, acquisition information, and a contents description. The single-page form has a 1.5 inch left margin with elements to indicate who produced the finding aid and when. The most notable differences between the two survey forms are

that the newer form lacks a subsequent history element, and the preliminary description was renamed the history and description of contents.

Twenty-seven examples of this new format were found among the eighteen reprocessed collections, dating from 1959 to 1972, all representing existing collections. Twelve of the finding aids are expressly for new additions, while fifteen are for collections that have been reprocessed, often to gather numerous additions made over the years into a single comprehensive finding aid. A sample of this finding aid is located in Appendix F. Within these finding aids, the only element that is not consistently completed is the states represented, and it is included in the majority of the examples. The collection number element often indicates the date of the addition, as well as the collection number. The physical description is presented in varying combinations of linear feet, number of items, and number of folders. Volumes are listed and in several instances the types of material are also included. The provenance information includes the type of acquisition, who gave the materials, where they are from, and the date. The length of the provenance varies from a single sentence to several sentences containing administrative information concerning additions to existing materials. One finding aid also contains a biographical sketch of the creator.

The contents description is labeled “History and Description of Contents,” in the earlier examples and is called the “description” in the other examples. The depth and breadth of the descriptions vary greatly, similar to the descriptions in older finding aids. The descriptions include information on the types of material and important people, dates, places, and subjects. Except for additions numbering only a handful of items, the finding aids do not treat the materials at the item level, but rather provide a general

overview of the contents. Some of the finding aids describe the contents at the container level, while others provide only a general descriptive paragraph for the entire collection. About half of the descriptions contain brief biographical sketches, and several contain administrative notes indicating changes in location or mergers with other materials. Some descriptions provide information on the arrangement of the collection, list related collections, or include references to more detailed descriptions in the library or published sources.

Unlike earlier finding aids, the size of the collection does not necessarily determine the length of the description. Fourteen of the finding aids include multiple pages of description and thirteen restrict the descriptive information to the single page survey, though only four of these thirteen examples are for five or less items. The others range from 230 items to 8.5 feet of materials described in less than half a page. The finding aids with multiple pages of description range from 550 items to 13.5 feet of materials. As with the older finding aid versions, the additional sheets of descriptive information do not follow a regulated format; rather, they are tailored to fit the individual needs of the collection. No two descriptions are alike, even though they may share common elements. The top of the page for most of these additional sheets contains the collection name, number, dates, and states. Many also have a brief sentence indicating what materials are being described, and most contain detailed accounts of the materials grouped by folders. Others have descriptions that are based on the chronology of the materials, rather than their arrangement into containers. Three contain volume lists, one has a proper name index, three have box lists, and several include administrative information concerning mergers, additions, and accessions. According to the dates at the

top of these additional sheets, not all of them were completed at the same time as the survey form, even though they describe the same materials. As these collections were reprocessed and updated over time, these additional sheets were created to help the Southern Historical Collection maintain better control of these complicated and often unwieldy collections, with their numerous additions from various sources over several decades.

Although this type of finding aid was first used before the publication of Schellenberg's *The Management of Archives* in 1965, it tends to conform to his guidelines more closely than earlier finding aids. Again, however, no direct reference can be drawn between Schellenberg's guidelines and descriptive practices at the Southern Historical Collection. Rather, because Schellenberg was so influential in the American archival profession, it can be assumed that his theories did have an impact on the finding aids produced at the Southern Historical Collection. Many of these finding aids contain a brief biographical sketch, and as Schellenberg recommends, they include the collection name and number, inclusive dates and states, provenance information, and extent, although not always in linear feet and number of items. The descriptions indicate the types of materials and they almost always include the subject matter, in addition to notable persons, places, and dates. References to published and unpublished sources of additional information are also listed. Notable discrepancies exist, however, between Schellenberg's suggestions and the practices at the Southern Historical Collection, emphasizing how individual repositories refined guidelines to fit their specific needs and practices. For example, the Southern Historical Collection did not consistently include biographical sketches in its finding aids, and those that were written were not as detailed

as Schellenberg advised. Moreover, whereas Schellenberg recommended that repositories use finding aids only for administrative purposes, the Southern Historical Collection made its inventories available as research tools for users.⁶⁷

A gap in coverage exists between the last finding aid described and the finding aids of the 1980s. None of the eighteen reprocessed collections had formal finding aids produced after 1972, until they were reprocessed in the 1990s and 2000s. Before these later generations of finding aids are discussed, however, it is necessary to examine the informal finding aids created for additions to the reprocessed collections from the 1940s through the 1970s. These informal additions follow no particular format, and because many are undated, it is difficult to determine their chronological progression and their relation to the formal surveys. Older collections often had numerous additions, and instead of creating an entirely new formal finding aid for each small addition, a brief description was simply typed and added to the existing descriptive material. Because many collections were described in such a piecemeal fashion over many decades, often with no overall descriptive summaries, it became cumbersome to wade through the finding aids to gain a general idea of the nature of the collections. These informal additions have no specific structure, although they do include the collection title and number, and sometimes the accession number and date of acquisition at the top of the page. This is typically followed by a contents description of varying depth. As with many of the formal finding aids, small collections numbering only a handful of items were described at the item level and larger additions received more general descriptions. These descriptions vary in format, ranging from descriptive paragraphs to item or container lists. Some of the descriptions also contain administrative notes indicating

location, provenance, and/or merger information, and sometimes even a biographical sketch.

The finding aids created at the Southern Historical Collection in the 1980s differ significantly from previous finding aids. They follow a structured, multi-page format that provides more detail and consistency in both presentation and content, and they closely resembled the best practice guidelines advocated by the Society of American Archivists, namely David Gracy's *Archives and Manuscripts: Arrangement and Description*. In the early 1980s, the Southern Historical Collection made a concerted effort to revise its finding aids to enhance their usability, and to make them compatible with the prevailing guidelines for archival description. The modified finding aids regularly contained biographical/historical sketches, scope and content notes, series descriptions, container listings, shelf lists, and information on access restrictions and copyright. Another development that further promoted consistency of presentation and structure was the use of word processors to author finding aids, beginning in 1984. Although earlier finding aid worksheets had one page of fairly structured fill-in-the-blank elements, the unregulated collection descriptions made those finding aids appear inconsistent and less cohesive, both in appearance and contents. The finding aids produced from the 1980s until the implementation of EAD in 1998 share a more uniform structure extending from the title page through the series descriptions that was absent in earlier generations of finding aids.⁶⁸

The reprocessed collections used in the analysis of the earlier finding aids did not contain any inventories from the 1980s; therefore, eleven finding aids produced from 1983 through 1990 were selected from a list of processed collections compiled from the

annual reports of 1980-1990. Only collections remaining relatively unaltered by additions dating after 1990 or conversion into EAD were included. Each of the eleven finding aids has a paper copy available for research at the Southern Historical Collection. Nine have ASCII finding aids available online, and two have only brief online summaries derived from the MARC records. The finding aids originally produced on word processors were converted into ASCII text files in the mid 1990s, to make them available online. Four of the finding aids were created before the introduction of word processors, and two of them were converted to electronic files at some point in time, while the other two have only brief summaries available online. An example of an ASCII finding aid from the 1980s is available in Appendix G.

The paper finding aids and their electronic counterparts differ slightly in structure and significantly in presentation. The paper finding aids are multi-page documents that have a title page containing the repository name, collection name and number, finding aid author, and the date of creation. The actual finding aid begins with an abstract, followed by online catalog terms, extent, provenance, access restrictions, copyright disclaimer, and a table of contents. An introduction containing a detailed biographical sketch comes next, followed by a scope and content note, which is called a collection overview beginning in the mid 1980s. For larger collections, the collection overview often includes an outline of the arrangement scheme, in addition to the narrative summarizing the contents of the collection. Next are the series descriptions, each of which contain a title, date range, extent, arrangement note, contents description, and a container listing that is usually at the folder, but sometimes at the box level. The contents description is comprised of paragraphs that summarize the series contents, including important people,

places, dates, and subjects. The contents are not described at the item level, although notable items often receive individual mention. Descriptions for any additions to the collections are placed at the end of the last series description, and they follow the same format. The final elements of the finding aids are a shelf list indicating the folders and/or series contained in each box and a listing of items separated from the collection and stored elsewhere. All of the pages except the title page have a heading with the collection name, number, and inclusive dates.

The ASCII finding aids have the same structural elements as the paper finding aids, but they lack title pages and shelf lists. The most notable difference between the two versions is presentation, because many stylistic elements common to word processors and even typewriters are not available in ASCII text files. Despite these differences between the electronic and paper versions, however, the finding aids are much more consistent than earlier generations of finding aids. Although the finding aids are still tailored to fit the nature of the collection, they regularly contain the same structural elements and are completed in a more methodical matter. The greatest difference among the finding aids is in the level of detail. For example, one biographical sketch can be more detailed than another, depending on what is known about the life of the creator. Moreover, some biographical sketches may be entirely narrative while others include additional elements such as family trees.

Aside from the level of detail, several other inconsistencies exist among the eleven finding aids, suggesting that perhaps alterations were made to the finding aids to enhance conformity during the ASCII conversion process. Finding aids produced as early as 1983 that have ASCII finding aids available online do not deviate from the

standard finding aid described above, but the two finding aids with only brief summaries available online differ from those available online in ASCII. One of the two finding aids, completed in 1983, originally had a biographical sketch proceeding the title page. An electronically produced page containing an abstract, extent, provenance, access terms, related collections and table of contents was inserted before the biographical sketch at a later date. The other finding aid, also completed in 1983, lacks an abstract, but does have elements for geographical location and inclusive dates and physical description. The online summaries for these two collections, which were derived from MARC records in the late 1990s, do have abstracts, though. Perhaps as MARC records were created for collections beginning in 1986, finding aids were updated to include abstracts. Moreover, as MARC records were created for existing collections, abstracts were likely added to those finding aids already existing in electronic format, with new paper copies produced for use in the Southern Historical Collection search room.

Despite the inconsistencies described above, the finding aids of the 1980s closely follow the recommendations of David Gracy, even though no direct references relate the Southern Historical Collection's efforts to revamp its finding aids to his work on archival description. Gracy had a significant impact on the American archival community, and the department stayed abreast of new developments, thus, it can be assumed that his writings greatly influenced the department's efforts to implement more uniform descriptive practices conforming to "national standards insofar as they have been established." The paper finding aids have a title page listing the name and address of the repository and staff involved in the production of the finding aid. The introductory information contains a table of contents, donor information, extent, dates, access

restrictions, and an abstract, although it is not known when this element was first used. These finding aids all include a biographical/historical sketch and a scope and contents note summarizing the contents of the records and their arrangement. The contents notes, however, do not indicate processing decisions, or strengths and weaknesses of the collection. In keeping with Gracy's suggestions, the series descriptions contain a title, series number, name, dates, and size, and they often indicate the type of material. They relate the materials to the creator and describe the overall contents of the series, but they do not note the physical condition of the records, the existence of copies, use restrictions, or closely related collections. The container lists do include the unique number and title of the container, which contains dates if the material is arranged chronologically. Items separated are listed, but the Southern Historical Collection's finding aids do not have indexes or appendices.⁶⁹

Finding aids created at the Southern Historical Collection in the 1990s are almost identical in structure and content to those produced in the 1980s. The department continued to stay abreast of national developments, but Fredric Miller's 1990 guidelines, *Arranging and Describing Archives and Manuscripts* did not require extensive alterations to the finding aid format then in use at the Southern Historical Collection. The finding aids created in the 1990s contain similar content elements to the 1980s finding aids, including an abstract, catalog terms, extent in number of items and linear feet, provenance, access restrictions, copyright information, table of contents, a biographical note, collection overview, series descriptions, container listings, and items separated. The 1990s finding aids also include a processing note indicating the source of funding for reprocessing or microfilming, and a listing of related collections when necessary. In

addition to the structural elements, the presentation of finding aids authored in the 1990s is similar to finding aids created in the 1980s. The ASCII text files available online do not differ in presentation and structure for the 1980s ASCII finding aids, and hard copies also resemble the word-processed finding aids produced in the 1980s, and include title pages and shelf lists.

During the 1990s, the Southern Historical Collection worked to update the finding aids of many older collections. A grant from the National Endowment for the Humanities in 1993 allowed the department to reprocess a selection of older collections, and eight of the eighteen reprocessed collections examined in this study received new finding aids during this grant project. The Southern Historical Collection also updated the finding aids for numerous other collections during the 1990s, including two of the ten reprocessed collections. These ten finding aids produced in the 1990s before the introduction of EAD are dated 1992-1998. In addition to the print copies available for research at the Southern Historical Collection, the ten finding aids are currently available online, eight as ASCII files and two now in EAD. The ten paper finding aids and the eight ASCII finding aids share a consistency that was present in the finding aids of the 1980s, but that was lacking in earlier finding aids. An example of the paper version of a 1990s finding aid is located in Appendix H.

Despite a general consistency in structure and content, variations among the finding aids do exist, as processors adapted the structured finding aid format to fit the needs of individual collections. Although the finding aids contain the same elements and they are consistently completed, the level of detail varies. For example, while nine of the biographical notes are detailed, ranging from a half page to several pages in length, one

collection does not have a biographical note. Likewise, the collection overviews are generally brief, numbering two or three paragraphs, and they are usually accompanied by a series listing, except for one collection that contains only a series listing. Two collections comprised of only one series do not have a collection overview; rather, they proceed directly from the biographical sketch to the series description. Moreover, most of the collections indicate the items separated at the end of the finding aid, while several include that information in the processing note or in an element for items separated in the introductory information. No evident pattern exists for this inconsistency, and it is not determined by whether the finding aid is paper or electronic in format. The finding aid for one of the collections differs markedly in format from the others –instead of having a single abstract and listing of online catalog terms, this finding aid has an overall abstract and listing of catalog terms, accompanied by abstracts and catalog terms for a selection of series and subseries that were cataloged separately. Although this facilitates online searching through the library catalog, the finding aid can be disorienting and overwhelming at first glance because of its length and complexity.

The series descriptions of the 1990s are generally more detailed than the descriptions in the finding aids produced from the 1930s through the 1970s. They continue to highlight important people, places, dates, and subjects, and collections are not treated at an item level, although important items often receive individual mention. The descriptions vary in length, from a few paragraphs to several pages, but this is largely determined by the nature and size of the collection. Notable discrepancies do exist, though, re-emphasizing the fact that despite the use of structured formats, finding aids continued to be individualized. For example, one collection has a series description over

eleven pages in length, which can be overwhelming at first glance, especially because it groups the series according to form while the folder list breaks down the collection chronologically. Another collection has series descriptions that are not in narrative form, but rather are chronological listings of the topics, followed by the container listing.

Although contents are individualized to fit the specific needs of the collections, the finding aids largely adhere to a structural format resembling the recommendations in Miller's *Arranging and Description Archives and Manuscripts*. The finding aids begin with a title page listing the collection name and number, as well as the name and address of the repository, and they contain a table of contents, provenance information, and indications of financial support. The Southern Historical Collection's finding aids do not, however, contain a foreword that highlights special aspects of the finding aid and provides instructions on how to use it. They have abstracts containing brief descriptions of the creator, the provenance, dates, and types of records, but they do not generally contain information on provenance, extent, and user restrictions. The biographical sketches summarize information about the creators to assist in the understanding of the records, and they mention published histories and biographies. The scope and content notes provide summary descriptions of the records, and outline the time span and arrangement scheme, but they do not usually include processing decisions and the availability of copies.⁷⁰

In keeping with Miller's recommendations, the series descriptions contain a title with the series name and number, dates, and extent, as well as an element for the arrangement scheme. The descriptions summarize the contents of each series, often relating the materials to the creator. They do not, however, indicate the strengths and

weaknesses of the collection, the physical condition, the existence of copies, or closely related records. Container lists indicate the container number and title. Sometimes they list each individual folder with its title, but sometimes, especially for larger collections, the folders are grouped together, such as “Folders 1-12: 1944.” The paper finding aids contain location information, but since these versions are available for public use, this information is not restricted to staff only.⁷¹

The next major alteration to the finding aids produced at the Southern Historical Collection was the implementation of EAD in 1998, resulting in electronically encoded finding aids that follow a standardized structure. Whereas the Southern Historical Collection exercised complete control in applying earlier best practice guidelines, EAD requires the department to follow certain structural rules to ensure consistency within the department and across repositories, while still allowing flexibility in the level of encoding, content, and presentation. New versions of EAD have been introduced to update the DTD and make it compliant with XML, but the basic structural elements have remained unchanged, so that the EAD finding aids produced at the Southern Historical Collection in 1998 have the same structure and presentation as the finding aids produced today. Even though the Southern Historical Collection does not make full use of all the available tags, the EAD finding aids are more detailed and consistent than any finding aids produced in the past.

Ten EAD finding aids dating from 1998 through 2002 are available from the eighteen reprocessed collections, and they have a consistent structure and presentation, both in the visible finding aid and the actual coding below the surface. An example of an EAD finding aid can be found in Appendix I. The visible EAD finding aids begin with

an introductory section that has the collection name, number, inclusive dates, and repository information including contact information and staff involved in processing the collection. Alongside this information is an outline with links to the various parts of the finding aid. Following this introduction is the descriptive summary, which contains elements for the repository name, creator, title, call number, extent in number of items and linear feet, and an abstract. Next is the administrative information, which includes restrictions to access, provenance information, preferred citation, and copyright notice. The administrative information is followed by online catalog headings, a biographical/historical note, and a collection overview, which can contain an outline of the collection arrangement.

The final major section of the EAD finding aids is the detailed description of the collection containing the series descriptions. Each series listing contains a title with the series number, name, and date range. This is followed by the extent, arrangement method, and a series description that outlines the contents of the series, including dates, types of materials, and important people, places, and subjects. Although collections are not typically treated at the item level, noteworthy items are often mentioned. Each series description includes a container listing, usually at the folder level, that includes the container number and title. Additions are described following the last series, and they include the same elements found in the series descriptions, but the accession number is included in the title line. Items separated and related collections are the final elements in the finding aid. Following each section of the document is a link to return to the top of the page.

Not all of the encoding is visible in the finished finding aid, including the EAD header, which contains coding documenting the EAD DTD and other bibliographic information. This heading information includes the file description with the title, author, and the publication statement, followed by a profile description denoting software used to create the finding aid, who authored it and when, and the language. Next is an element to document any revisions to the finding aid. Whereas repositories can exercise flexibility in the use of many elements of the EAD DTD, the EAD Header must follow a particular sequence to ensure uniformity across and within institutions.

Although the EAD documents produced at the Southern Historical Collection are more consistent than previous generations of finding aids, minor variations do exist. For example, in the earlier EAD finding aids, the descriptive summary is labeled the descriptive summary including abstract. Also, the detailed description of the collection is called the series description for collections with multiple series and the description for collections consisting of a single series. The depth of the description varies among finding aids, due to the size of the collection, the amount of information known about the creator, and the nature of the materials. Moreover, in the container listings, some collections are listed at the folder level, while others are at the box level. Content and element-wise, the EAD finding aids are very similar to the finding aids of the 1980s and the 1990s, with the main difference being the encoding, presentation, and consistency. The EAD encoding provides enhanced searchability and presentation options over the ASCII text formatting, and the finding aids are easier to use and navigate. In addition to being available online, the EAD finding aids are printed out for use in the Southern

Historical Collection, and their presentation is more regulated and less cluttered than earlier finding aids, further increasing usability.

The Southern Historical Collection's EAD finding aids follow the Society of American Archivists recommendations as presented in the *EAD TAG Library* and the *EAD Application Guidelines*. The EAD header follows the required sequence, and the Southern Historical Collection took advantage of the front matter option to create its own title page for its EAD finding aids. The Southern Historical Collection's descriptive summaries provide the descriptive identification at the collection level, and the department uses the abstract, repository, extent, collection number, and the unit (collection) title from the range of available elements. The department also makes use of selected elements of the administrative information, including access restrictions, provenance, preferred citation, and copyright notice. The detailed description of the collection is the description of subordinate components, and the Southern Historical Collection employs component levels to create a hierarchical structure among the series, subseries, and containers. The department includes selected elements from the descriptive identification for each series/subseries description, such as unit title, date, extent, arrangement, and scope and content, and the container listings include elements for container type and unit title. Thus, although the Southern Historical Collection follows the required structural standards of EAD, it also takes advantage of EAD's inherent flexibility to individualize finding aids to best fit the needs of the repository.⁷²

CONCLUSION

An analysis of the structure and content of the finding aids used at the Southern Historical Collection provides insight into the development of descriptive practices at the national level, while revealing how a single repository has grappled with the issue of archival description over a span of seventy years. Comparisons of the Southern Historical Collection's finding aids within a single generation provide snapshots of the department's descriptive practices, emphasizing the fact that although the structural elements of most finding aids were regularly completed, the contents were highly individualized. A cross-generational analysis of finding aids depicts the evolution of the department's finding aids, revealing both consistencies and irregularities in descriptive procedures, including the persistence of traditional localized practices and the incorporation of new developments and techniques. An examination placing the Southern Historical Collection's finding aids in the context of national descriptive guidelines provides insight into American archival profession's gradual shift from tailoring recommended guidelines to fit local needs to the employment of national descriptive standards.

The Southern Historical Collection updated its finding aids multiple times from the 1930s through the 1990s, in attempt to improve administrative control of and access to manuscript materials. The structural elements of the finding aids remained fairly consistent through the 1970s, although the presentation differed among the finding aids. The most notable inconsistencies were in the contents of these finding aids, especially the

collection descriptions, which varied greatly in presentation, length, depth, and content. This practice was not considered unusual, though, because the archival community viewed description as a highly individualized process, and it was custom to adapt national guidelines to fit local needs. The Southern Historical Collection reengineered its finding aids in the 1980s, corresponding to the professions awakening realization that increased standardization of description was desirable and possible. Even though discrepancies continued to exist among the descriptions because of the unique nature of manuscript materials, the department's finding aids became more uniform in structure and content, and the finding aids produced today using EAD differ little structurally and contents-wise from the finding aids produced in the 1980s.

This study is important because it illustrates how the descriptive practices of a single institution relate to national trends in archival description. Long considered a preeminent manuscripts repository, the Southern Historical Collection has stayed abreast of national descriptive trends, and its finding aids serve as an example of the profession's ongoing efforts to provide improved access to collections. The development of finding aids at the Southern Historical Collection mirrors the evolution of national descriptive practices, reflecting the archival community's struggle to shift from individualized local practices that adapt national guidelines to fit specific needs, to universal descriptive standards that still allow a degree of flexibility to account for the unique nature of archival materials.

NOTES

¹ Susan Sokol Blosser and Clyde Norman Wilson, *The Southern Historical Collection: A Guide to Manuscripts*, with a preface by J. Isaac Copeland, (Chapel Hill: University of North Carolina Library, 1970); *The Bookmark: Fiftieth Anniversary, Southern Historical Collection*, (Chapel Hill: University of North Carolina at Chapel Hill, 1981), 46-59.

² Blosser and Wilson, *The Southern Historical Collection*..

³ "Report of the Working Group on Standards for Archival Description," *American Archivist* 52 (Fall 1989): 442.

⁴ Susan E. Davis, "Descriptive Standards and the Archival Profession," *Cataloging and Classification Quarterly* 35 (2003):279; William J. Van Schreeven, "Information Please: Finding Aids in State and Local Archival Depositories," *American Archivist* 3 (July 1942): 169-178; Jane F. Smith, foreword to *The Management of Archives* by T.R. Schellenberg (New York: Columbia, 1965, Washington, DC: National Archives and Records Administration, 1988), v-xxiv.

⁵ Ruth K. Nuremberger, "A Ten Year Experiment in Archival Practices," *American Archivist* 4 (October 1941): 250-261.

⁶ Kenneth W. Duckett, *Modern Manuscripts: A Practical Manual for their Management, Care, and Use* (Nashville, TN: American Association for State and Local History, 1975), 135-140.

⁷ Committee on Finding Aids, *Inventories and Registers: A Handbook of Techniques and Examples* (Chicago: Society of American Archivists, 1976), 5-10.

⁸ *EAD Application Guidelines for Version 1.0*, (Chicago, Society of American Archivists, 1999), 4-5, 11; "Report of the Working Group on Standards for Archival Description," 440-461.

⁹ "Report of the Working Group on Standards for Archival Description," 440-451.

¹⁰ David Bearman, "Description Standards: A Framework for Action," *American Archivist* 52 (Fall 1989): 514-519; Lisa Weber, "Archival Description Standards: Concepts, Principles, and Methodologies," *American Archivist* 52 (Fall 1989): 504-513; Richard Szary, "Archival Description Standards," *American Archivist* 52 (Fall 1989): 520-526; "List of Manuals Providing Guidance or Instruction on the Description of Archives and Manuscripts," *American Archivist* 52 (Fall 1989): 494-496; "Select Bibliography on Standards for Archival Description," *American Archivist* 52 (Fall 1989): 498-501.

¹¹ Encoded Archival Description Working Group, *Encoded Archival Description Tag Library, Version 1.0* (Chicago: Society of American Archivists, 1998), vii-viii, 1-3.

¹² *EAD Application Guidelines*, 6-7; *EAD Tag Library*, 1-2.

¹³ Jackie M. Dooley, ed., *Encoded Archival Description: Context, Theory, and Case Studies*, (Chicago: Society of American Archivists, 1998); Daniel Pitti, "Encoded Archival Description: The Development of an Encoding Standard for Archival Finding Aids," *EAD: Context, Theory, and Case Studies*, pp. 7-22.

¹⁴ Kris Kiesling, "EAD as an Archival Descriptive Standard," *EAD: Context, Theory, and Case Studies*, pp. 81-90.

¹⁵ Dennis Meissner, "First Things First: Reengineering Finding Aids for Implementation of EAD," *EAD: Context, Theory, and Case Studies*, pp. 93-107.

¹⁶ Daniel Pitti and Wendy Duff, eds., *Encoded Archival Description on the Internet*, (New York: Haworth Information Press, 2001); Helen Tibbo, review of *EAD on the Internet*, ed. Pitti and Duff, *D-Lib Magazine* 9 (April 2003): 1.

¹⁷ *The Southern Historical Collection of Manuscripts at the University of North Carolina Chapel Hill, North Carolina*, reprint of *Bookmark* (Chapel Hill, University of North Carolina Library, 1955), 3; *Guide to the Manuscripts in the Southern Historical Collection of the University of North Carolina*, James Sprunt Studies in History and Political Science (Chapel Hill: University of North Carolina Press, 1941), v-vi; Blosser and Wilson, *The Southern Historical Collection*, preface.

¹⁸ J.G. de Roulhac Hamilton to Frank Porter Graham, 14 December 1937, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

¹⁹ Hamilton to Graham, 14 December 1937; Gay Garrigan Moore, "The Southern Historical Collection in the Louis Round Wilson Library of the University of North Carolina, From the Beginning of the Collection through 1948" (M.L.S. Thesis, University of North Carolina, 1958), 30-32; "Report on the Activities of the University of North Carolina Library, 1933-1934," 20 September 1934, in the Records of the Academic

Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

²⁰ Moore, "The Southern Historical Collection," 30-32; "The Historical Records Survey," 1940, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

²¹ Dan Lacy to Mrs. Lyman Cotton, 7 August 1936, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; Works Progress Administration, "Supplement 6 to the Manual of the Historical Records Survey: The Preparation of Guides to Manuscripts," 10 September 1937, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

²² Hamilton to Graham, 14 December 1937; "Report" 14 December 1938, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; Moore, "The Southern Historical Collection," 32-36; J.G. de Roulhac Hamilton, *The Southern Historical Collection of the University of North Carolina* (Chapel Hill: University of North Carolina, 1945), 5; *Guide to the Manuscripts in the Southern Historical Collection*, 1.

²³ Moore, "The Southern Historical Collection," 47; "Organization Memorandum No. 42," 15 December 1955, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

²⁴ James W. Patton to the American Historical Association Committee to Consider the Use of Manuscripts, 19 December 1949, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; Moore, "The Southern Historical Collection," 48, 59-63.

²⁵ "Organization Memorandum No. 42."

²⁶ *Ibid.*

²⁷ *Ibid.*

²⁸ "Questionnaire: Rare Book and Special Collections in University Libraries," 9 June 1970, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; Blosser and Wilson, *The Southern Historical Collection*, 1-2, 5.

²⁹ "Manuscripts Department Administrative Manual," October 1974, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "Manuscripts Department Administrative Manual," September 1975, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

³⁰ Faye P. Gamel to Carolyn Wallace, 27 June 1980, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "Annual Report, Technical Services Section, 1990-91," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

³¹ "Report of the Manuscripts Department and Southern Historical Collection, 1980-1981," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; Gamel to Wallace, 27 June 1980; "Report of the Manuscripts Department and Southern Historical Collection, 1982-1983," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; David Moltke-Hansen to Tim West, 19 April 1989, in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

³² Gamel to Wallace, 27 June 1980.

³³ "Annual Report, Technical Services Section, 1990-91."

³⁴ "Report of the Manuscripts Department and Southern Historical Collection, 1982-1983"; "Technical Services Annual Report, 1984-85"; Lynn Holdzkom to Peter J. Roberts, 8 October 1998, in the EAD files of the Southern Historical Collection, Wilson Library, University of North Carolina at Chapel Hill.

³⁵ "Technical Services Annual Report, 1984-85"; "Technical Services Annual Report, 1989-90," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "Technical Services Annual Report, 1986-87."

³⁶ Moltke-Hansen to West, 19 April 1989.

³⁷ "Technical Services Annual Report, 1984-85," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "Technical Services Annual Report, 1987-88," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "Manuscripts Department: Preliminary Annual Report, 1985-86," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

³⁸ "Annual Report, Technical Services Section, 1990-91."

³⁹ "Annual Report, Technical Services Section, 1991-92," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; Alphonso Calhoun Avery finding aid summary, 01 April 1991 in the Control Files, Manuscripts Department, Wilson Library, University of North Carolina at Chapel Hill; "Manuscripts Department, 1992-1993 Annual Report," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

⁴⁰ "Manuscripts Department, 1992-1993 Annual Report."

⁴¹ Moltke-Hansen to West, 19 April 1989; "Report of the Manuscripts Department and Southern Historical Collection, 1982-1983"; "Technical Services Section Annual Report, FY94-95," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "Technical Services Section Annual Report, FY1995-96," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

⁴² "Technical Services Section Annual Report, FY1995-96"; "Annual Report, 1997-1998," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill; "EAD Information for Public Service," 6 July 1998 in EAD files in the Southern Historical Collection, Wilson Library, University of North Carolina at Chapel Hill.

⁴³ "Version 1.0 of EAD SGML DTD Now Available," 3 September 1998 in EAD files in the Southern Historical Collection, Wilson Library, University of North Carolina at Chapel Hill; "Annual Report, FY2002/2003," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

⁴⁴ University of North Carolina at Chapel Hill Libraries Manuscripts Department, www.lib.unc.edu/mss/inv.html, viewed on 1 April 2004; "Annual Report, 1997-1998"; "Annual Report, 1999-2000," in the Records of the Academic Affairs Library Manuscripts Department, University Archives, Wilson Library, University of North Carolina at Chapel Hill.

⁴⁵ Works Progress Administration, "Supplement 6"; T. R. Schellenburg, *The Management of Archives*, foreword.

⁴⁶ David B. Gracy, *Archives & Manuscripts: Arrangement and Description*, Basic Manual Series, (Chicago: Society of American Archivists, 1977).

⁴⁷ Fredric M. Miller, *Arranging and Describing Archives and Manuscripts*, Archival Fundamentals Series, (Chicago: Society of American Archivists, 1990).

⁴⁸ "The Historical Records Survey," 1940; Moore, "The Southern Historical Collection," 30-32.

⁴⁹ "Report of the Working Group on Standards for Archival Description," 441; Works Progress Administration, "Supplement 6."

⁵⁰ Works Progress Administration, "The Manuscript Collection Form," 1936; Works Progress Administration, "The Manuscripts Collection Form Revised," 1937; Works Progress Administration, "Supplement 6."

⁵¹ Schellenberg, *The Management of Archives*.

⁵² *Ibid.*, 240-252.

⁵³ *Ibid.*, 244-252.

⁵⁴ Gracy, *Archives & Manuscripts*. 1.

⁵⁵ *Ibid.*, 19-21, 27.

⁵⁶ Miller, *Arranging and Describing Archives and Manuscripts*, 109-110.

⁵⁷ *Ibid.*, 93-98.

⁵⁸ Pitti, "Encoded Archival Description: The Development of an Encoding Standard for Archival Finding Aids," 11-13; *EAD Tag Library*, vii-viii; *EAD Application Guidelines*, 2-7.

⁵⁹ *EAD Application Guidelines*, preface; *EAD Tag Library*, vii-viii, 5.

⁶⁰ *EAD Tag Library*, 5-6.

⁶¹ *Ibid.*, 6-9

⁶² *Ibid.*, 6-9

⁶³ *Ibid.*, 5-11.

⁶⁴ Dan Lacy to Mrs. Lyman Cotton, 7 August 1933; "Supplement 6 to the Manual of the Historical Records Survey: The Preparation of Guides to Manuscripts," 10 September 1937.

⁶⁵ Moore, "The Southern Historical Collection," 47; "Organization Memorandum No. 42," 15 December 1955.

⁶⁶ Moore, "The Southern Historical Collection," 48.

⁶⁷ Schellenberg, *The Management of Archives*, 240-252.

⁶⁸ "Technical Services Annual Report, 1984-85."

⁶⁹ "Report of the Manuscripts Department and Southern Historical Collection, 1980-1981;" Gracy, *Archives and Manuscripts: Arrangement and Description*, 21-30.

⁷⁰ Miller, *Arranging and Describing Archives and Manuscripts*, 93-98.

⁷¹ *Ibid.*

⁷² *EAD Tag Library*, 1-13; *EAD Application Guidelines*, 2-12.

APPENDIX A

LIST OF COLLECTIONS EXAMINED

Reprocessed Collections with EAD Finding Aids:

Alphonso Calhoun Avery Papers, #3456
 Avery Family of North Carolina Papers, #33
 Boykin Family Papers, #78
 Burwell Family Papers, #112
 George Phifer Erwin Papers, #246
 William Gaston Papers, #272
 G.W.F. Harper Papers, #313
 Howerton Family Papers, #359
 Robert E. Lee Papers, #422-z
 Ruffin, Roulhac, and Hamilton Family Papers, #643

Reprocessed Collections from 1993 NEH Grant:

Jessie Daniel Ames Papers, #3686
 Braxton Bragg Comer Papers, #168
 Stephen D. Heard Papers, #1478
 John Steele Henderson Papers, #327
 Lenoir Family Papers, #426
 Lee Slater Overman Papers, #570
 Daniel Augustus Tompkins Papers, #724
 William Worrell Vass Papers, #739

1980s Finding Aids:

Walter Reece Berryhill Papers, #4174
 James Crawford Biggs Papers, #4299
 Brown Lung Association Records, #4463
 R.D.W. Connor Papers, #2427
 Harold Dunbar Cooley Papers, #3801
 W. Stump Forwood Papers, #260
 L.H. Fountain Papers, #4304
 Frederick Henry Koch Papers, #4124
 Charles Walter Tillett Papers, #4438
 Gladys Avery Tillett Papers, #4385
 Raymond Milner Wheeler Papers, #4366

APPENDIX B
FINDING AID, 1936

Mrs. Cotten #112

WPA Form 17HR WORKS PROGRESS ADMINISTRATION

SURVEY OF STATE AND LOCAL HISTORICAL RECORDS: 1936
HISTORICAL RECORDS SURVEY
(Name of State)

THE MANUSCRIPT COLLECTION FORM

(Leave this space blank)

County Orange City or town Chapel Hill, N. C.

Name of owner or holder University of N. C.

Name of building Library
(Street address)

1. Name of collection Burwell, William Henry Va. & N. C.

2. Inclusive dates, total numbers, numbering and lettering (by year) of volumes, files, bundles, etc.
1750- 1923
3, 290 items (papers and 37 vols) = 9 boxes

3. Missing material, by numbers and dates

4. Size
(Approximate size of volumes, files, boxes, bundles, etc., by uniform groups)

5. Location by dates and units (volumes, etc.)
(Room or vault names or numbers)

6. History of the collection Gift of the Burwell family through Mrs. Wm. N. Boyd, Warrenton, N.
Wm. Henry Burwell, b- Dec. 4, 1835- d Sept. 25, 1917 only child of Wm. Armistead
and Mary William Burwell, b on Warren, now Vance Co. Planter, business man, large tobacco
and cotton interests.

7. Analysis of the contents of the collection Wills, deeds, indentures, business papers of all
kinds, correspondence legal, business, promisory notes, teachers contracts, a small
number of personal papers scattered throughout the collection. 1792- To Armistead
Burwell at Long Island, from Lewis Burwell, tobacco to be sent to Lynchburg. Dec. 5,
1792- Letter from Patrick Henry to A Burwell concerning sale of Long Island, foodstuff
beefs, negroes etc. 1795- Memorandum of agreement between Frances Wilton and Lewis

U. S. GOVERNMENT PRINTING OFFICE 16-4924

(over)

FINDING AID, 1936

Burwell; deeds, indentures, July 13, 1797- Concerning negroes in Ky. Dec. 29, 1815- Washington, from W. A. Burwell to Armistead in Legislature, Richmond, on "happy change that has taken place in our affairs." judicious measures of internal policy, system of National defence, etc. 1816- 1817- group of letters from Chapel Hill. Oct. 29, 1819- Program - Philadelphia Theatre, "Wanted a Wife" and "Ellen Rosenberg;" Jan. 1, 1853- Woodworth Store, William S. Ransom asking support of W. Burwell for office of county clerk, as his brother Matt Ransom has been raised from that position to Attorney General. Feb. 1st, 1853- Greensboro, Calvin H. Wiley to W. A. Burwell regarding certain laws governing the State Superintendent of Common Schools, and the appointment of teachers. During 1860- 65 there is a meagre collection of papers dealing with the Confederacy. Jan. 8th 1864- One letter from Lieut. John E. Dugger appealing to W. H. Burwell sr. for contributions of food for his men. Jan. 14, - Discharge by substitution of W. H. Burwell from 37th N. C. Regiment; May 22, 1864- Letter appraising family that Armistead Burwell and many others are wounded, some friends killed in battles around Richmond; Sept. 1st 1864- Letter from Johnston's Island from John T. Williams, a prisoner; a few official papers. 1865- 1900- Business papers mercantile accounts, tobacco accounts, sale of cotton, number of copies of Merchants Planters Exchange Prices Current, Petersburg letter sheet price- current etc. papers of commission merchants, cotton factors- womens letters are absent from these papers. Among the correspondents are: Lewis Burwell, Patrick Henry, Henry Lee, John W. Clay, A. G. Boyd, John W. Williams, John T. Williams, Blair Burwell, Richard Sneed, William A. Burwell, Lewis P. Burwell, Wm. A. Alexander, A. K. Burwell, Wm. H. Burwell, Philip B. Glenn, Wm. Hicks, Spotswood Burwell, George W. Burwell, Calvin H. Wiley, John D. Fain, John Hargrove, Henry T. Burwell, J. I. Jones, and others.

FINIDNG AID, 1936

1815-	BURWELL, WILLIAM HENRY	#112
	37 Ms. volumes.	1805-1902
	Warren and Vance Counties,	North Carolina
oy,	1. 1805-06. Account book for stud service and boarding horses, and miscellaneous	
	2. 1820-53. Miscellaneous account book, personal.	
erg;"	3. 1820-28. Physician's accounts.	
r office	1841-54. Miscellaneous accounts.	
o	4. 1826-29. Accounts, settlement of Williams estate.	
regardin	5. 1830-34. Accounts continued, settlement of Williams estate.	
ntment	6. 1832-39. Miscellaneous accounts and expenses of Spotswood Burwell and J. Y. Taylor on a gold mining trip.	
h the	7. 1837. Blacksmith's accounts.	
	8. 1850-57. Class book, Tabernacle Society.	
	9. 1853-56. Personal accounts, miscellaneous.	
	10. 1855-66. Estate of Spotswood Burwell, & miscellaneous accounts.	
is	11. 1855-71. " " " " " "	
	12. 1858-59. " " " " " "	
apers	13. 1857-59. Pledges and payments for support of Minister; also farm accts.	
nts	14. 1859. Miscellaneous accounts.	
ers	15. 1862-68. " "	
ers.	16. 1861. " "	
ay,	17. 1866. " "	
	18. 1862. Payments for church at Tabernacle.	
rwell	#19. through 1863- Miscellaneous accounts, cotton records, farm and	
y,	#31. -1885. personal accounts, blacksmith book, accounts with laborers, cash and supply. 13 volumes.	
	32. 1882-87. Estate of E. W. Watkins, accounts.	
	33. 1882. Roll book for colored school, Vance County, N. C.	
	34. 1884. Miscellaneous accounts.	
	35. 1886-1902. Farm accounts.	
	36. 1888-89. Farm accounts.	
	37. 1888-96. A woman's household accounts.	

APPENDIX C
FINDING AID, 1937

<u>Allie Mae Blake</u> <small>(Worker's full name)</small>	<u>Feb. 12, 1940</u> <small>(Date)</small>	
		<u>#168</u>

**WORKS PROGRESS ADMINISTRATION
DIVISION OF WOMEN'S AND PROFESSIONAL PROJECTS
THE HISTORICAL RECORDS SURVEY: 1937
1734 NEW YORK AVE., NW., WASHINGTON, D. C.**

WPA Form 17 HR (Revised) The Manuscript Collection Form Revised

City or town Chapel Hill, State N. C.

Manuscript depository Library of U. M. C. (Exact name in full) (Street address)

1. Name of collection Comer, Braxton Bragg Comer & Birmingham, Ala.
(Exact title of collection in quotes)

2. Earliest, latest, and most important dates of material 1908--1927
(See supp. 6, par. 33.)

3. Quantity 20,000 items- uncalendered- chronological (papers and vols.)
(Number of pieces; number and size of volumes; portfolios; packages, folders, file drawers, boxes, etc. Give after each quantity mentioned an estimate of the number of pieces contained)
(7 volumes including the addition,
6 filed with 8 vols.)
(Personal letterbook, 1907-08, and 6 scrapbooks.
8 Filed in Box 23 S-644.)

4. Location and physical condition of collection
(Floor, room number, library call number. State whether, in general, collection is legible and well preserved; also whether protected from weather and other destructive agencies)
U. S. Library

5. Give a brief description of the collection Letters and papers of Comer deal with political,
(Include persons, dates, places, and subjects chiefly dealt with. Indicate types of material included, as diaries, correspondence, etc. See supp. 6, par. 36. Languages represented other than English)
business, personal and educational affairs of Ala. The bulk of the letters are
copies written by Comer himself. They deal with plantation life, cotton manufacturing
hunting and other outdoor life, political affairs. 1908- Industrial crisis, Ala.
politics. 1915 & 1916 Political campaign, price and sale of livestock, plantation
life, business papers regarding Avondale Mills, banking affairs. 1917 & 18- Prohibition
price and sale of cotton, debate as to whether the government should own and control
the Railroads, war conditions, price of foodstuff due to the war, correspondence
between Comer and son who was in Camp Gordon, gubernatorial campaign of 1918, crop

6. Give reason for the importance of the collection
(Indicate what important contribution to knowledge is made by all or any part of the collection)

* Attach additional sheet if space on form insufficient. Take care to indicate item number of each continued explanation.

16-4024

FINDING AID, 1937

Allie Mae Blake	Feb. 12, 1940	
<small>(Worker's full name)</small>	<small>(Date)</small>	<small>(Form identification No.)</small>
WORKS PROGRESS ADMINISTRATION DIVISION OF WOMEN'S AND PROFESSIONAL PROJECTS THE HISTORICAL RECORDS SURVEY: 1937 1734 NEW YORK AVE., NW., WASHINGTON, D. C.		
#168		

WPA Form 17 HR
(Revised)

The Manuscript Collection Form Revised

City or town Chapel Hill, State N. C.

Manuscript depository Library of U. N. C.
(Exact name in full) (Street address)

1. Name of collection Comer, Braxton Bragg Comer & Birmingham, Ala.
(Exact title of collection in quotes)

2. Earliest, latest, and most important dates of material 1908--1927
(See supp. 6, par. 32.)

3. Quantity 20, 000 items- uncalendered- chronological (papers and vols.)
(Number of pieces; number and size of volumes; portfolios; packages, folders, file drawers, boxes, etc. Give after each quantity mentioned an estimate of the number of pieces contained.)
(7 volumes including the addition,
6 filed with 8 vols.)
(Personal letterbook, 1907-08, and 6 scrapbooks.
Filed in Box 23 S-644.)

4. Location and physical condition of collection
(Floor, room number, library call number. State whether, in general, collection is legible and well preserved; also whether protected from weather and other destructive agencies)
U. N. C. Library

5. Give a brief description of the collection Letters and papers of Comer deal with political,
(Include persons, dates, places, and subjects chiefly dealt with. Indicate types of material included, as diaries, correspondence, etc. See supp. 6, par. 36. Languages represented other than English)
business, personal and educational affairs of Ala. The bulk of the letters are
copies written by Comer himself. They deal with plantation life, cotton manufacturing
hunting and other outdoor life, political affairs. 1908- Industrial crisis, Ala.
politics. 1915 & 1916 Political campaign, price and sale of livestock, plantation
life, business papers regarding Avondale Mills, banking affairs. 1917& 18- Prohibition
price and sale of cotton, debate as to whether the government should own and control
the Railroads, war conditions, price of foodstuff due to the war, correspondence
between Comer and son who was in Camp Gordon, gubernatorial campaign of 1918, crop

6. Give reason for the importance of the collection
(Indicate what important contribution to knowledge is made by all or any part of the collection)

* Attach additional sheet if space on form insufficient. Take care to indicate item number of each continued explanation.

16-4024

FINDING AID, 1937

conditions, N. Y. cotton exchange reports, sale of land, signing of Armistice.
 1919- Tax rate in Mobile Co. Ala, articles on cotton cultivation, work of Farmers
 League, Indenture between Edward T. and Donald Comer, industrial and labor conditions,,
 suffrage question, law regulating working hours of women and children. 1920--1925
 Settlement of notes, Hoover candidacy, sentiment on immigration, death of Mrs. Comer,
 letters of condolence, Mr. Comer appointed to U. S. Senate to fill vacancy of John
 H. Bankhead, regulations regarding child labor, cotton futures act, House bills,
 letters regarding Avondale Mills stock, letters showing Mr. Comer's effort to aid
 cotton growers, data on Auburn College, President Harding's view on prohibition,
 numerous letters (copies) from Comer, giving account of hunting trips, paper
 relative to Catherine - Comer School, political letters, financial depression among
 farmers, Mr. Comer refuses to enter Senatorial race, account of second marriage of
 Comer to Mary Carr Gibson , 1926& 1927- Family letters from B. B. Comer to his
 brother E. T. Comer, long correspondence on Muscle Shoals, state political need for
 education in Ala. condition of pecan crop, from Gov. Bibb Graves on seven months
 school term, convict question, road problem, water power development, Aug. 15, 1927
 death of B. B. Comer, numerous letters of sympathy. The collection contains also
 six scrap books.

filed with S Series

~~continuation of item 7.~~

15-- George Huddleston, 16- Thomas E. Kilby, 17- B. H. Meyer, 18- Leo S. Overman,
19- C. V. Underwood, 20- H. B. Sherrill, 21- Chas. C. Weaver.

APPENDIX D
FINDING AID, 1944

7 *(A)* *Addition to #78* *Sc. 8* *✓*

Accessioned 740. MAR 30 44 SOUTHERN HISTORICAL COLLECTION 1846-72
University of North Carolina

COLLECTION RECORD *S. C. and Civil war in Va.*

Name of Collection BOYKIN PAPERS ADDITION to G 78

Given *(A)* ~~by~~ *Miss May Boykin, Boykin, S. C.*

Date Feb. 28, 1944 Agreement filed _____

Number of copies _____ To be sent to: _____

1846-64 *(A)* CONTENTS (estimated)
Military papers of Capt. A. Hamilton Boykin. Also
Manuscripts bills, receipts, cotton accounts, muster rolls.
Contracts.

Books None

LOCATION IN LIBRARY 3-30-44

Temporary-- Manuscripts Manuscripts Dept.

Books _____

Permanent-- Manuscripts _____

Books _____

SURVEYED

Manuscripts 107 items By B. Allan

Books, _____ By _____

REGISTERED IN GUIDE

Manuscripts _____ Books _____

REMARKS

a few envelopes filed with undated military papers.
discarded as worthless, Oct. 1951.
(This group was listed in our records at one time as LEMUEL BOYKIN, Acc. 740)
Approved: _____

FINDING AID, 1944

Added to G-78
(A)

UNIVERSITY
78-A
~~740~~

SOUTHERN HISTORICAL COLLECTION
University of North Carolina,
Chapel Hill, N.C.

MANUSCRIPT COLLECTION SURVEY

Name of Collection BOYKIN PAPERS ADDITION

Inclusive dates, 1846-64 and 1872

Number of Items 107 (papers + 3 small vols.)

History of collection Gift of Miss May Boykin
Boykin, S. C.
Feb. 28, 1944.

June 9, 1861-
8-12-62: About half of this collection consists of the military correspondence and papers of A. Hamilton Boykin of South Carolina, Captain of the Independent Mounted Rangers, C.S.A. These papers include medical certificates, general orders (Army of Northern Va. and Army of the Potomac), circulars, requests for transfer in service, certificates of substitution, Regulations about furloughs and transportation expenses, and Quartermaster and ordnance business. There is also a map of the region of the Potomac. - 48 items

1846 - Contract between Boykin & S. C. Railroad. - 1
1852 - Lists of votes taken at Lyzenbys Box and/or Buffalo for state elections. [S.C.] - 8
1856-60 - Cotton accounts of A. H. Boykin, Camden, with Reeder and De Saussure, Charleston. - 13
1858-64 - Bills & receipts, mostly for army ordnance and quartermaster supplies. A. H. Boykin, Richmond - 34
Two muster and payrolls of Boykin's Rangers, 3-1-62 to May 1, 1862, and Aug. 31 to Oct. 31, 1861. - 2
1872 - Land survey, Sumter County, S. C., laid out to Thomas C. Richardson by Robert Breun, Dep. Surveyor. - 1

107

3 undated circulars in Capt. Boykin's papers concern relief for the sufferers of Charleston.

CSA - Military Papers

APPENDIX E
FINDING AID, 1953

*Added to T.F. Hickerson Papers
in 1970*

SOUTHERN HISTORICAL COLLECTION
University of North Carolina

States **N.C.**

Accession No. 2577-B Dates **1939-1940**

Date June 15, 1953 Items **2 folders.**

Name of Collection LENOIR-NORWOOD
PAPERS.

Given^I }
Deposited } by **Mr. T. Felix Hickerson**
Lent for filming } **Chapel Hill, N. C.**
Lent for copying }

This group is to be kept as a separate unit.
Mr. Hickerson wants a copy of the item "In Memoriam - Capt. Thomas
Other terms: **Lenoir Norwood**" - 1 page.

PRELIMINARY DESCRIPTION: Correspondence of Mr. Hickerson, Chapel Hill, N. C.,
1939-1940, with various scattered relatives concerning
the Norwood branch of the Lenoir family.
A folder of notes, charts, and other memoranda,
apparently compiled 1939-40 in connection with the
above listed correspondence, relating to the genealogy
and family history of the Lenoir and Norwood family.

*collected in connection with Mr. Hickerson's book Happy Valley.

SUBSEQUENT HISTORY:
file (=Folders 23, 24, as of May 1958)
Thos. L. Norwood item handed to photolab 6-16-53.
Print made and item filed same day.
on Allan's desk

FINDING AID, 1953

Oct. 1958. *Summary of Accessions Thus far*

2577

LENOIR-NORWOOD

PAPERS, 1786-1909.

North Carolina

2 boxes. (24 folders and 14 vols.)

- (A) 1791-1909. Family correspondence of Lenoir, Norwood, and Pickens families. North Carolina and Alabama. 43 items. Gift of Miss Laura Lenoir Faucette, Lenoir, N. C., July 1943.
- (B) 1939-1940. Correspondence of T. F. Hickerson, Chapel Hill, N. C., concerning family history. 2 folders. (Folders 23, 24) Gift of T. F. Hickerson, June 1953.
- (C) 1953. Letter from Mrs. John H. Van Zandt, Dallas, Texas, to T. F. Hickerson about Norwood descendants. Typescript, 4 pp. Received in June 1954 by Sou. Hist. Collection.
- (D) 1792-1889. Family papers--Lenoir, Howe, Norwood. Also slight diary, 1806 of Thomas Lenoir. Purchased from A. E. Weatherly, Greensboro, N. C., February 1958.
- (E) 1786-1906. Correspondence of Walter W. Lenoir and other Lenoirs. Also, William Lenoir's map of Happy Valley (manuscript). Gift of Mr. Hugh G. Chatham, whose father had purchased them from E. A. Weatherly. May 1958. 175 items.
- (F) 1831-1849. Diary of Thomas Lenoir, on his business trips to Haywood County, North Carolina. 13 slim, unbound manuscript volumes.

As of October 1958:

The total group, above listed, is now in two boxes. (There are 24 folders, 1786-1909, and one envelope containing manuscript volumes.)

A total survey and new cards will be needed eventually. Wait until additions cease and then study the relationship between these papers and the overlapping Lenoir Family Papers, No. 1, and possibly other groups.

- (?) There is more than one connection between Lenoir and Norwood families. General William Lenoir's ~~sister~~ ^{aunt?} Leah married (2nd) John Wall Norwood (1727-1802), Franklin County, North Carolina, and they had six children. Laura Leah Lenoir, daughter of Thomas Lenoir (1780-1861), married Joseph Caldwell Norwood.

APPENDIX F

FINDING AID, 1963

7

[These are the BOYKIN PAPERS in the
Manuscripts Department, University of North Carolina Library]
Chapel Hill, North Carolina

SOUTHERN HISTORICAL COLLECTION

NAME: BOYKIN, ALEXANDER HAMILTON (1815-1866) Number #78

PAPERS

INCLUSIVE DATES: 1748-1932 STATES: S. C.
Virginia

PHYSICAL
DESCRIPTION: ca. 900 items including 4 volumes

ACQUISITION:
Gifts of Mrs. Burwell H. Boykin, Miss May Boykin, Miss Mary Boykin Halle,
and Miss Mary Morris Boykin, before 1940 until 1952.

DESCRIPTION:
Chiefly business papers but some personal correspondence of
Alexander Hamilton Boykin (1815-1866), cotton planter; South Caro-
lina legislator, 1846-64; and Captain, C.S.A. His plantation, Plane
Hill, was located near Camden, S. C. There are also papers of Mrs.
Boykin and some correspondence from her father, W. F. DeSaussure of
Columbia, S. C. After 1865 the papers are mainly those of Alexander
Hamilton Boykin, son of the above named A. H. Boykin. There is
personal correspondence between other members of the Boykin and
DeSaussure families.

Civil War papers consist of military papers, 1861-62 of Capt.
A. H. Boykin, leader of Boykin's Rangers, an independent company of
S. C. Mounted Rangers in Richmond, Flint Hill, and Manassas, Virginia.

Unpublished description in the library.

Date of
this
record
11-26-63
By:
E. Strong

[A.H.B., Sr. was b. Dec. 10, 1815; married Sarah J. DeSaussure,
Nov. 26, 1835, and died March 8, 1866.]

Sent LC
11 27 63

FINDING AID, 1963

#78

BOYKIN

PAPERS

1748-1932 and undated

South Carolina

39 folders, including 4 MS. "volumes" in folder #39.

Accession Record: (See accession sheets and receipts attached)

The original group of 800 items came as the gift of Mrs. Burwell H. Boykin and Miss May Boykin before 1940 and it is listed in the Guide.

Addition A.

107 items, 1846-72, came by gift from Miss May Boykin in Feb. 1944.

Addition B.

6 folders full, 1756-1902, came by gift from Miss Mary Morris Boykin, Pelham, New York, in January 1952.

Addition C.

2 letters of Lemuel Boykin, 1844, were received by gift from Miss Mary Boykin Haile, Boykin, S. C., in February 1944, were listed as a separate group, but in July 1959 were added to the BOYKIN PAPERS.

The entire group was rearranged in 39 folders and resurveyed in July 1959.

APPENDIX G

FINDING AID, 1984

Manuscripts Department
Library of The University of North Carolina
at Chapel Hill

SOUTHERN HISTORICAL COLLECTION

#4366
RAYMOND MILNER WHEELER PAPERS
Inventory

Abstract: Raymond Wheeler of Charlotte, N.C., was an internist, civil rights activist, and advocate of better health care and nutrition for the poor, especially in the South.

Chiefly material pertaining to the social justice activities in which Wheeler took part, from the mid-1950s to 1982. Letters, informational bulletins, clippings, and texts of speeches are among the items that document Wheeler's testimony on hunger and malnutrition in America before various Congressional committees and his involvement with such organizations as the Southern Regional Council, the National Sharecropper's Fund, the North Carolina Hunger Coalition, the North Carolina Civil Liberties Union, and the Charlotte Citizen Action Team. Aside from a few letters Wheeler wrote to his parents during World War II, there is very little of personal nature in the collection.

Online Catalog Terms:

Charlotte Citizen Action Team (Charlotte, N.C.).
Malnutrition--Southern States--History--20th century.
National Sharecroppers' Fund.
North Carolina Civil Liberties Union.
North Carolina Hunger Coalition.
North Carolina--Social conditions.
Social problems--Societies, etc.
Social reformers--North Carolina.
Soldiers--United States--History--World War, 1939-1945--
Correspondence.
Southern Regional Council.
Wheeler, Raymond Milner, 1919-1982.

Size: About 1500 items (four linear feet).

Provenance: Received from Julie Wheeler, Charlotte, North Carolina in October 1983.

Access: Personnel-related materials from the Southern Regional Council, the North Carolina Hunger Coalition, and the National Sharecropper's Fund/Rural Advancement Fund are closed until 1 January 2000. Otherwise, no restrictions.

FINDING AID, 1984

Related Collections: Coles, Robert (#4333). Coles was one of six physicians, including Wheeler, who studied poverty and malnutrition in the South in 1967.

Dabbs, James McBride (#3816). Dabbs and Wright were successive presidents of the Southern Regional Council and friends of Wheeler.

Wright, Marion Allen (#3830).

Copyright: Retained by the authors of items in these papers, of their descendants, as stipulated by United States copyright law.

Table of Contents:

- Introduction
 - Biographical Note
 - Collection Overview
- Series Descriptions
 - Series 1. General Subject Files
 - Series 2. Southern Regional Council
 - Series 3. National Sharecroppers Fund/Rural Advancement Fund
 - Series 4. Photographs
- Shelf List

INTRODUCTION

Biographical Note

Raymond Milner Wheeler was born on 30 September 1919, in Farmville, North Carolina. He received his undergraduate degree from the University of North Carolina at Chapel Hill in 1939, and his M.D. from Washington University in St. Louis, Missouri, in 1943. After serving as a captain in the Army Medical Corps in World War II, Wheeler returned to North Carolina, entering private practice in internal medicine in Charlotte in 1948.

First married in 1942 to Mary Lou Browning, Wheeler was divorced in 1956. He married Julie Buckner Carr in 1958.

In 1956, Wheeler joined the Southern Regional Council, an organization that had grown out of the Commission on Interracial Cooperation. He served as chairman of its Executive Committee from 1964-1969, and as president from 1969 to 1974.

Wheeler was one of a team of six doctors who participated in a field study of health and living conditions of black children in two rural Mississippi counties in 1967. The team later testified before the U.S. Senate's Employment, Manpower, and Poverty Subcommittee, describing the severe cases of lack of health care, malnutrition, and near starvation that they had seen. Wheeler's

FINDING AID, 1984

testimony, which was among the most eloquent and the most frequently quoted in the national press, brought him both fan mail and hate mail (folder 38). *Hungry Children*, the report from that field study (folder 47), published by the SRC, was the basis for a 1968 documentary by CBS, *Hunger in America*.

Wheeler was also active in a number of Charlotte-based organizations, including the Charlotte Citizen Action Team, a group concerned with growth and development in Charlotte; and with the Charlotte Human Relations Council. As a physician, he worked vigorously for improved conditions in Charlotte Memorial Hospital, and for community health centers aimed specifically at meeting the needs of lower-income people.

His ongoing concern for the welfare of the rural poor also led Wheeler to investigate living conditions of migrant workers in camps in Florida and Texas during the late 1960s and mid-1970s. He served as president of the North Carolina Hunger Coalition from 1974 to 1979. He chaired the Executive Committee of the National Sharecropper's Fund from 1976 to 1978 and was its president from 1978 until his death on 17 February 1982.

Collection Overview

Most of the material in the Raymond Milner Wheeler Papers pertains to the social justice activities in which Wheeler took part, from the mid-1950s to 1982. Letters, informational bulletins, clippings, and texts of speeches are among the items that document Wheeler's testimony on hunger in America before various Congressional committees and his involvement with such organizations as the Southern Regional Council, the National Sharecropper's Fund, the North Carolina Hunger Coalition, the North Carolina Civil Liberties Union, and the Charlotte Citizen Action Team. Aside from letters Wheeler wrote to his parents during World War II, there is very little of a personal nature in this collection.

The papers are arranged in four series: (1) General Subject Files; (2) Southern Regional Council; (3) National Sharecropper's Fund/Rural Advancement Fund; and (4) Pictures. The arrangement of the first series is consistent with Wheeler's own organization of his files, with some minor changes and additions to improve access. The series descriptions and folder lists which follow provide more detailed information.

SERIES DESCRIPTIONS

Series 1. General Subject Files

1944-1945; 1952-1982. About 1300 items.

Arrangement: alphabetical by folder title; chronological
 within each folder.

Correspondence, clippings, pamphlets, essays, texts of speeches, and other materials relating chiefly to Wheeler's work

FINDING AID, 1984

as a physician and social activist. Of particular interest are those files which deal with Wheeler's testimony on hunger in America before different Congressional committees, and those pertaining to his work with the North Carolina Hunger Coalition.

- Folder 1. Abortion
- 2. Alcoholism (Pamphlets)
- 3. Alexander, Frederick Douglas
- 4. American Civil Liberties Union
- 5. Amnesty
- 6. Anthony, Paul
- 7. Brown Lung
- 8. Cancer
- 9. Charlotte (N.C.) Memorial Hospital
- 10. Children's Foundation
- 11. Citizens Party
- 12. Civil Liberties
- 13. Community Organization
- 14. Correspondence, Miscellaneous, 1961-1974
- 15. Correspondence, Miscellaneous, 1975-1979
- 16. Correspondence, Miscellaneous, 1980-1982
- 17. Dabbs, James McBride
- 18. Democratic Party
- 19. Denver, Colorado: Department of Health and Hospitals
- 20. Drug Abuse (Ford Foundation Research)
- 21. Dunbar, Leslie
- 22. Education
- 23. Field Foundation: 1977 Field Survey
- 24. Field Foundation: Special Report
- 25. Fleming, Harold
- 26. Food Stamps
- 27. Gaston, Paul M.
- 28. Golden, Harry
- 29. Gussow, Joan Dye
- 30. Health, Preventive
- 31. Health, Rural--North Carolina
- 32. Health Care Delivery--Comprehensive Health Centers
- 33. Health Care Delivery--Other
- 34. Helms, Jesse
- 35. Hospital Bed Utilization
- 36. "Human Values and Public Policy"--Conference, December 1979
- 37. Hunger, Congressional Testimony on, 1967-1968
- 38. Hunger, Congressional Testimony on, 1967-1968 --Correspondence
- 39. Hunger, Congressional Testimony on, 1972
- 40. Hunger, Congressional Testimony on, 1979-1981
- 41. Hunger--Facts
- 42. Hunger--Speech Material
- 43. Hunger Conference, Chapel Hill, 1974
- 44. Hunger in North Carolina--General
- 45. Hunger in North Carolina--Facts

FINDING AID, 1984

46. Hunger in U.S.A.--Speeches, 1970-1971
47. Hungry Children--Original Reports
48. King, Martin Luther
49. Legal Services of North Carolina
50. Malnutrition--Brain Development
51. Malnutrition--Statements on
52. Maryland Defective Delinquent Act
53. Medical Care--Articles and Clippings
54. Medicine and Philosophy
55. Migrant Farmworkers--News Clippings, 1969-1975
56. Migrant Farmworkers--Reports, Memos, and
Correspondence, 1969-1975
57. Migrant Farmworkers--Reports, 1977
58. National Health Insurance
59. Neighborhood Medical Clinic (Charlotte, NC)
60. North Carolina Council on Food and Nutrition--
Conference, 1977
61. North Carolina Hunger Coalition:
Correspondence, Minutes of Meetings, etc.,
1974-1975
62. North Carolina Hunger Coalition:
Correspondence, Minutes of Meetings, etc.,
1976-1980
63. North Carolina Hunger Coalition: Personnel
Matters (under seal until 2000)
64. North Carolina Social Services Study
Commission
65. Patrick, H. Louis
66. Patterson, Ernest Finney
67. Pettigrew, Thomas F.
68. Poverty, Rural--Notes on
69. Raper, Arthur
70. Sanford High School
71. Soul City--Clippings
72. Southern Rural Health Conference, 1976
73. Speech Material
74. J.P.Stevens
75. Tax Structure (Reform)
76. Van Hecke, Merwin Spenser
77. Voting Rights
78. Watters, Pat
79. Welfare Programs
80. Wheeler, Raymond M.--Army Appointments
81. Wheeler, Raymond M.--Continuing Medical
Education
82. Wheeler, Raymond M.--Correspondence:
Letters to His Parents, 1944-1945
83. Wheeler, Raymond M.--Curriculum Vitae
84. Wheeler, Raymond M.--Writings and Speeches--
Early Writings
85. Wheeler, Raymond M.--Writings and Speeches--
Converse and Davidson Colleges
86. Wheeler, Raymond M.--Writings and Speeches--
Medical Writings

FINDING AID, 1984

- 87. Wheeler, Raymond M.--Writings and Speeches--
"View of the South" (1968)
- 88. Wheeler, Raymond M.--Writings and Speeches--
Published Writings
- 89. Wheeler, Raymond M.--Writings and Speeches--
Miscellaneous
- 90. Wheeler, Raymond M.--Clippings About RMW
- 91. Wheeler, Raymond M.--Obituaries, Memorials,
etc.
- 92. Wildlife Resources Commission
- 93. Wright, Marion, and George Wald
- 94. Miscellaneous

Series 2. Southern Regional Council
1963-1982, and undated. About 130 items.

Letters, memoranda, and other documents (mostly photocopies)
assembled by Wheeler during his involvement with the SRC.

- Folder 95. Executive Committee: Correspondence and
Minutes of Meetings, 1969-1975
- 96. Executive Committee: Correspondence and
Minutes of Meetings, 1976-1982
- 97. Executive Committee: Reports and Presidential
Addresses, 1965-1968
- 98. Executive Committee: Reports and Presidential
Addresses, 1969-1974 and undated
- 99. Minutes of Annual Meetings: 1976 and 1977
- 100. Correspondence Between Field Foundation and
SRC Executives, 1976 and 1979
- 101. Correspondence Between Ford Foundation and
SRC Executives, January-September 1980
- 102. Correspondence Between Miscellaneous
Foundations and SRC Executives, 1980-1982
- 103. Correspondence re Placement of SRC Archives
- 104. Special Projects: Legislative Reapportionment,
1980
- 105. Special Projects: Rural Health Project
- 106. Special Projects: Southern Legislative
Research Council
- 107. Special Projects: Legislative Reapportionment,
1981
- 108. Special Projects: Legislative Reapportionment,
1982
- 109-111. Special Projects: Task Force on Southern Rural
Development
- 112. Briefing, Discussion, and Miscellaneous Papers
- 113. Typescript of Report: Hunger and Malnutrition
- 114. By-Laws, Statement of Purpose, etc.
- 115. Financial and Budgetary Matters, 1963-1981
- 116-120. Personnel Matters, 1971-1977
(UNDER SEAL)

FINDING AID, 1984

Series 3. National Sharecroppers Fund/Rural Advancement Fund
1974-1981, and undated. About 80 items.

Mostly correspondence, minutes of meetings, and special reports by the NSF/RAF. Arrangement is similar to that used for Series 2.

- Folder 121. Executive Committee Activities, 1976-1978
- 122. Executive Committee Activities, 1979-1981
- 123. National Board: Minutes of Meetings, 1977-1980
- 124. Correspondence, 1977-1978
- 125. Correspondence, 1979-1981
- 126. By-Laws, Statement of Purpose, etc.
- 127. Planning and Concept Papers
- 128. Topical Reports and Papers
- 129. Financial and Budgetary Matters
- 130. Personnel Matters, 1977-1979 (UNDER SEAL)

Series 4. Pictures

- P-4366/1. Raymond Wheeler at about age 50, ca. 1970.
- P-4366/2. RMW at 60, 1980.
- P-4366/3-4. RMW in Army uniform, posing with seven other soldiers, ca. 1944-1945.
Subjects are identified on verso of P-4366/3; RMW is on far right.
- P-4366/5. The senior class, Sanford (NC) High School, 1936.
RMW was class president.
- P-4366/6. The Sanford High School Class of 1936 at their 35th reunion, 1981.
RMW is probably in second row, third from left.
- P-4366/7. RMW and the five other members of the medical team who produced Hungry Children,

appearing before the U.S. Senate Subcommittee on Employment, Manpower, and Poverty, 1967.
RMW is third from left; Robert Coles is second from left.
- P-4366/8. Senators Robert Kennedy, Peter Edelman, and Edward Kennedy, all members of the above Subcommittee, 1967.
- P-4366/9-10. Members of the Subcommittee, 1967.
In P-4366/9, Robert Kennedy is at far left; Edward Kennedy is third from left.

FINDING AID, 1984

SHELF LIST

- | | |
|--------|----------------------------|
| Box 1. | Series 1 (Folders 1-33) |
| 2. | Series 1 (Folders 34-69) |
| 3. | Series 1 (Folders 70-94) |
| | Series 2 (Folders 95-108) |
| 4. | Series 2 (Folders 109-120) |
| | Series 3 (Folders 121-130) |
| 5. | Material under seal |

Items separated:

P-4366/1-10

APPENDIX H
FINDING AID, 1993

Manuscripts Department
Library of the University of North Carolina
at Chapel Hill

SOUTHERN HISTORICAL COLLECTION

#739

WILLIAM WORRELL VASS PAPERS

Inventory

Compiled by

Ginny Briggs
Angela Dickerson
Tim West

November 1993
with subsequent additions

FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

Abstract: William Worrell Vass was treasurer, 1845-1893, of the Raleigh and Gaston Railroad and an official of the Chatham, the Raleigh and Augusta, and the Seaboard Airline railroads (later merged into the CSX Corporation).

Railroad business records, family and personal business correspondence, and other materials of W. W. Vass. Railroad materials are most plentiful for the Raleigh and Gaston Railroad, but are present for the numerous roads with which Vass was in some way associated over his long career. These materials include extensive incoming and copies of outgoing correspondence as well as financial records of many kinds, reports, minutes of stockholders meetings, and other items. The bulk of the railroad records date from the 1870s to the 1890s, with some earlier material is included. Also included are letterpress copy and sales invoice books of the Carolina Paper Company, 1895-1896. Family and personal business correspondence of Vass consists mainly of correspondence and other items concerning the numerous loans Vass made to individuals in Granville and Wake counties and other areas and to the properties he rented, particularly in Granville County. There are also letters from relatives and friends, papers relating to Vass's activities as a Baptist layman, especially material relating to the North Carolina Baptist Publications and Sunday School Society in the 1840s, and detailed records of the course and treatment of the typhoid fever suffered by Vass's son Will in 1898.

Online Catalog Terms:

Baptist Sunday School Society.
Baptist State Convention of North Carolina--History--19th century.
Baptists--North Carolina--History--19th century.
Carolina Paper Company.
Chatham Railroad Company.
CSX Corporation--History.
Granville County (N.C.)--History.
North Carolina--Economic conditions.
Paper industry--North Carolina--History--19th century.
Railroads--Management--History--19th century.
Railroads--North Carolina--History--19th century.
Raleigh and Augusta Railroad Company.
Raleigh and Gaston Railroad Company.
Seaboard Airline Railroad Company.
Typhoid fever--North Carolina--History.
Vass, William Worrell, 1821-1896.
Wake County (N.C.)--History.

Size: About 12,600 items (16.0 linear feet).

FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

Provenance: Received from Eleanor Vass, Raleigh, N.C., before 1940 and from J. Douglas Mattox in December 2000 (Acc. 98808). Purchased from J. Douglas Mattox, October 1999 (Acc. 98481).

Access: No restrictions.

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FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

Collection Overview

The collection is arranged as follows:

- Series 1. Railroads
 - Subseries 1.1. Correspondence and related items
 - Subseries 1.1.1. Incoming
 - Subseries 1.1.2. Outgoing
 - Subseries 1.2. Accounts and ledgers
 - Subseries 1.3. Bills and receipts
 - Subseries 1.4. Other items
- Series 2. Carolina Paper Company
- Series 3. Personal Materials of W.W. Vass
 - Subseries 3.1. Correspondence and related items
 - Subseries 3.1.1. Incoming
 - Subseries 3.1.2. Outgoing
 - Subseries 3.2. Bills and Receipts
 - Subseries 3.3. Other Items
- Series 4. Other materials

FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

SERIES DESCRIPTIONS

Series 1. Railroads

1834-1896. About 5,900 items, including 19 volumes.

Subseries 1.1. Correspondence

1834-1894. About 3,750 items, including 17 volumes.

Subseries 1.1.1. Incoming Correspondence

1834-1896. 3,650 items.

Arrangement: chronological.

Chiefly letters from stockholders and railroad officials. Most letters concern the Raleigh and Gaston Railroad, although the other lines with which Vass was associated are also represented. Letters from stockholders mostly concern the transfer, purchase, or cancellation of stock, or dividends from it. Letters from railroad officials regard amounts owed by the Raleigh and Gaston and other matters.

Folder	1	1834-1851
	2	1852-1854
	3	1856-1859
	4	1860-1861
	5	1862-1866
	6	1867
	7	1868
	8	Jan-July 1869
	9	Aug-Dec 1869
	10	Jan-June 1870
	11	July-Dec 1870
	12	Jan-June 1871
	13	July-Dec 1871
	14	Jan-June 1872
	15	July-Dec 1872
	16	Jan-Apr 1873
	17	May-July 1873
	18	Aug-Dec 1873
	19	Jan-May 1874
	20	June-Dec 1874
	21	Jan-June 1875
	22	July-Dec 1875
	23	Jan-Dec 1876
	24	Jan-June 1877
	25	July-Dec 1877
	26	Jan-July 1878
	27	Aug-Dec 1878
	28	Jan-June 1879
	29	July-Dec 1879
	30	Jan-June 1880
	31	July-Dec 1880
	32	Jan-Dec 1881
	33	Jan-May 1882
	34	June-Sept 1882
	35	Oct-Dec 1882

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VASS, WILLIAM WORRELL, 1821-1896
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36	Jan-May 1883
37	June-Sept 1883
38	Oct-Dec 1883
39	Jan-May 1884
40	June-Dec 1884
41	Jan-June 1885
42	July-Dec 1885
43	Jan-Apr 1886
44	May-Dec 1886
45	Jan-May 1887
46	June-Aug 1887
47	Sept-Dec 1887
48	Jan-Apr 1888
49	May-Sept 1888
50	Oct-Dec 1888
51	Jan-Feb 1889
52	Mar-May 1889
53	June-July 1889
54	Aug-Sept 1889
55	Oct-18 Nov 1889
56	20 Nov-Dec 1889
57	Jan-Feb 1890
58	Mar-Apr 1890
59	May-June 1890
60	July-Aug 1890
61	Sept-Oct 1890
62	Nov 1890
63	Dec 1890
64	Jan-Feb 1891
65	Mar 1891
66	Apr-15 May 1891
67	18 May-June 1891
68	July-Aug 1891
69	Sept-14 Nov 1891
70	16 Nov-Dec 1891
71	Jan 1892
72	Feb-Mar 1892
73	Apr-May 1892
74	June-July 1892
75	Aug-Oct 1892
76	Nov 1892
77	Dec 1892
78	Jan 1893
79	Feb 1893
80	Mar 1893
81	Apr-May 1893
82	June 1893
83	July-Aug 1893
84	[empty]
85	Sept-Oct 1893
86	Nov 1893
87	Dec 1893
88	Jan 1894
89	Feb 1894
90	Mar 1894

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91	May-June 1894
92	July-Sept 1894
93	Oct-Dec 1894
94	Jan-Feb 1895
95	Mar-Apr 1895
96	May-June 1895
97	July-Sept 1895
98	Oct-15 Nov 1895
99	16 Nov-Dec 1895
100	Jan-Feb 1896
101	Mar-May 1896
102	June-Aug 1896
103	Nov-Dec 1896; 1900; 1911
104	Undated
105	Undated
106	Undated
107	Undated

Subseries 1.1.2. Outgoing Correspondence

1872-1894. About 100 items, including 17 volumes.

Arrangement: chronological.

Outgoing letters from W. W. Vass about railroad business. Most letters are to stockholders, banks, or railroad officials. They deal with overdue bills and various other financial matters, stockholders meetings, stock transfers, and related concerns, and other matters. Most letters concern the Raleigh and Gaston Railroad, although the other lines with which Vass was associated are also represented.

Loose Items

Folder 108	10 July 1872-2 Mar 1889
109	24 Sept 1890-17 Sept 1892
110	7 Nov 1892-28 Mar 1893
111	26 May 1893-Undated
112	Undated

Letterpress Copybooks

113	Oct 1871-June 1872, 10 pages (Vol. 1).	
114	1872-1877, 491 pages (Vol. 2).	
115	Mar 1877-July 1877, 130 pages (Vol. 3)	
116	July 1877-Dec 1878, 495 pages (Vol. 4).	117
118	June 1880-Jan 1882, 506 pages (Vol. 6).	
119	Jan 1882-Jan 1883, 483 pages (Vol. 7).	120
122	Jan 1884-Dec 1888, 500 pages (Vol. 10).	
123	Mar 1886-Dec 1887, 495 pages (Vol. 11).	
124	Dec 1887-Dec 1888, 500 pages (Vol. 12).	
125	Dec 1888-Jan 1889, 492 pages (Vol. 13).	
126	Dec 1888-Dec 1893, 482 pages (Vol. 14).	
127	Dec 1889-Oct 1890, 466 pages (Vol. 15).	
128	Oct 1890-July 1892, 843 pages (Vol. 16)	
129	July 1892-Jan 1894, 670 pages (Vol. 17).	

Subseries 1.2. Accounts and Ledgers

1838-1882. About 525 items, including 2 volumes.

FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

Arrangement: by railroad, then by type.

Varied financial records of numerous railroads with which Vass was associated, as noted below.

Raleigh and Gaston Railroad

Monthly Statements

Folder 130 31 June 1838-31 May 1869
131 Feb 1870-Aug 1871
132 Sept 1871-31 May 1873
133 Apr 1874-Dec 1877
134 31 Jan 1878-Oct 1878
135 Feb 1870-July 1879
136 July 1881-30 June 1893

137 Transportation Records, Oct 1855-31 May 1878

138 Financial Statements, 31 July 1883-30 June 1893

139 Passenger Reports, Jan 1874-Oct 1874

Balances Due from Agents

140 July 1856-June 1872
141 31 May 1873-31 May 1881

Treasurer's Statements

142 31 May 1870-31 May 1873
143 31 Aug 1873-31 May 1874
144 Nov 1874-Feb 1876
145 Feb 1877-Dec 1877

Stock

146 1 Oct 1856-July 1871
147 16 Oct 1873-12 Dec 1896 and undated

Accounts

148A 1847-1849 (Vol. S-19B)
148B Nov 1837-Feb 1872
149 31 Mar 1872-Dec 1872
150 Jan 1873-Feb 1875
151A Mar 1875-Dec 1877

151B Road and Bridge Dept. Expenses, Dec 1885-June 1888
(Vol. 19A)

Miscellaneous

152 Oct 1838-1893 and undated
153 31 Aug 1875-1893 and undated

Raleigh and Augusta Railroad

154 Financial Statements, 1 June 1874-30 June 1893

155 Accounts, Oct 1872-Dec 1889

156 Balances Due from Agents, 31 Aug 1872-31 May 1880

FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
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No. 739

- Monthly Statements
 - 157 31 May 1873-Apr 1878
 - 158 31 May 1878-Apr 1893
- 159 Treasurer's Statements, 31 Aug 1872-31 May 1888 and undated
- 160 Stocks, 14 Nov 1895-12 Nov 1896
- Chatham Railroad
 - 161 Financial Statements, 31 Dec 1865-1 June 1874
 - 162 Monthly Statements, 31 Dec 1865-31 May 1869
 - 163 Accounts
 - 163 Dec 1868-28 Mar 1871
 - 164 1868-1870 (Vol. 18)
 - 165 Miscellaneous Ledgers, Oct 1868-Aug 1878
- Other Railroads (Miscellaneous Ledgers)
 - 166 Seaboard Airline, Jan 1871-Sept 1878
 - 167 Durham and Northern, Nov 1877-Aug 1888
 - 168 Richmond and Danville, Apr 1873-July 1873
 - 169 Western, Apr 1873-Feb 1874
 - 170 Petersburg, Nov 1856-May 1868
 - 171 North Carolina, Dec 1866
 - 172 Baltimore and Ohio, 5 Mar-14 Apr 1873
 - Unidentified
 - 173 Cash Book Ledgers, Mar 1871-28 Nov 1873
 - 174 Ledgers, 1 Oct 1857-2 Apr 1887 and undated
 - 175 Ledgers for N.C. State Bonds, 13 Nov 1852-June 1873
 - 176 [Empty]

Subseries 1.3. Bills and Receipts
1851-1896. About 1,050 items.
Arrangement: chronological.

Bills and receipts and related items regarding such matters as road repairs, supplies, such as cross-ties, reimbursements for over-charges, and dividends. Railroads involved are chiefly Raleigh and Gaston, Chatham, Petersburg, and Seaboard Airline.

Folder 177 11 Aug 1851-22 Dec 1859
178 1 Jan 1860-19 Oct 1865
179 13 Mar 1866-12 Dec 1869

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VASS, WILLIAM WORRELL, 1821-1896
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180	1 Jan 1870-23 Dec 1871
181	1 Feb 1872-8 Dec 1873
182	24 Jan 1874-6 Dec 1875
183	18 Jan 1876-29 Oct 1879
184	Jan 1880-31 Oct 1881
185	25 July 1882-21 Dec 1882
186	20 Mar 1883-19 Nov 1883
187	4 Jan 1884-24 Sept 1888
188	22 Mar 1889-27 Dec 1890
189	3 Jan 1891-21 Dec 1891
190	1 Jan 1892-30 Apr 1892
191	2 May 1892-30 Dec 1892
192	3 Jan 1893-1896
193	Undated

Subseries 1.4. Other Items Concerning Railroads
1853-1896. About 580 items.
Arrangement: chronological.

Various items concerning railroads other than correspondence, accounts/ledgers, and bills and receipts. Included are such items as coupons and passes, meat and meal tickets for employees, resolutions, by-laws, lists of stockholders and minutes of stockholders meetings, miscellaneous statistics, and an album containing newspaper clippings about railroads and other matters. Most items relate to the Raleigh and Gaston and the Raleigh and Augusta Railroads.

Folder 194	1 May 1853-20 Jan 1870
195	July 1872-Apr 1883
196	13 Nov 1883-June 1888
197	27 July 1888-6 Dec 1889
198	1890-21 Jan 1891
199	2 Oct 1891-8 Mar 1893
200	18 May 1893-20 Dec 1893
201	9 Feb 1894-28 Apr 1896
202	12 Nov 1896-Undated
203	Undated
204	Undated
205	Undated
206	Undated
207	Undated
208	Undated
209	Undated
210	Newspaper Clippings for Raleigh and Gaston RR 1863-1883

Series 2. Carolina Paper Company
1895-1896. 2 volumes.

Two letterpress copybooks with letters concerning the Carolina Paper Company.

Folder 211	1 Oct 1895-4 Mar 1896, 50 pages (Vol. 20)
212	1 Oct 1895-28 Mar 1896, 30 pages (Vol. 21)

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VASS, WILLIAM WORRELL, 1821-1896
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Series 3. Personal Materials

1844-1930. About 6,450 items, including 3 volumes.

Subseries 3.1. Correspondence

1844-1899. About 1,800 items, including 2 volumes.

Subseries 3.1.1. Incoming Correspondence

1844-1899. About 1,725 items.

Arrangement: chronological.

Chiefly letters either concerning payments on loans Vass had made (confirmation of receipt, negotiating delayed payments, etc.) or requesting loans. Most letters are from individual debtors, and many of these are notable for phonetic spelling. Many other letters are from lawyers representing the interests of debtors. Scattered throughout are letters from insurance companies concerning dividends from policies and letters from renters of property that Vass apparently owned in Granville County and other locations.

A few letters in the early years concern the North Carolina Baptist Publications and Sunday School Society, of which Vass was corresponding secretary, and a number concern the livelihood of Baptist ministers. There are letters in the 1890s concerning Wake Forest College, attended during that decade by Vass's son, Will, and from Dwight L. Moody, requesting donations. There are also scattered letters from relatives and friends concerning family and personal matters, including letters from friends to Will Vass in the 1890s.

Folder 213	1844-1851
214	1852-1854
215	1856-1859
216	1860-1861
217	1862-1866
218	1867
219	1868
220	Jan-July 1869
221	Aug-Dec 1869
222	Jan-June 1870
223	July-Dec 1870
224	Jan-June 1871
225	July-Dec 1871
226	Jan-June 1872
227	July-Dec 1872
228	Jan-Apr 1873
229	May-July 1873
230	Aug-Dec 1873
231	Jan-May 1874
232	June-Dec 1874
233	Jan-June 1875
234	July-Dec 1875
235	Jan-Dec 1876

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VASS, WILLIAM WORRELL, 1821-1896
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236	Jan-June 1877
237	July-Dec 1877
238	Jan-July 1878
239	Aug-Dec 1878
240	Jan-June 1879
241	July-Dec 1879
242	Jan-June 1880
243	July-Dec 1880
244	Jan-Dec 1881
245	Jan-May 1882
246	June-Sept 1882
247	Oct-Dec 1882
248	Jan-May 1883
249	June-Sept 1883
250	Oct-Dec 1883
251	Jan-May 1884
252	June-Dec 1884
253	Jan-June 1885
254	July-Dec 1885
255	Jan-Apr 1886
256	May-Dec 1886
257	Jan-May 1887
258	June-Aug 1887
259	Sept-Dec 1887
260	Jan-Apr 1888
261	May-Sept 1888
262	Oct-Dec 1888
263	Jan-Feb 1889
264	Mar-May 1889
265	June-July 1889
266	Aug-Sept 1889
267	Oct-18 Nov 1889
268	20 Nov-Dec 1889
269	Jan-Feb 1890
270	Mar-Apr 1890
271	May-June 1890
272	July-Aug 1890
273	Sept-Oct 1890
274	Nov 1890
275	Dec 1890
276	Jan-Feb 1891
277	Mar 1891
278	Apr-15 May 1891
279	18 May-June 1891
280	July-Aug 1891
281	Sept-14 Nov 1891
282	16 Nov-Dec 1891
283	Jan 1892
284	Feb-Mar 1892
285	Apr-May 1892
286	June-July 1892
287	Aug-Oct 1892
288	Nov 1892
289	Dec 1892
290	Jan 1893

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VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

291	Feb 1893
292	Mar 1893
293	Apr-May 1893
294	June 1893
295	July-Aug 1893
296	Sept-Oct 1893
297	Nov 1893
298	Dec 1893
299	Jan 1894
300	Feb 1894
301	Mar 1894
302	May-June 1894
303	July-Sept 1894
304	Oct-Dec 1894
305	Jan-Feb 1895
306	Mar-Apr 1895
307	May-June 1895
308	July-Sept 1895
309	Oct-15 Nov 1895
310	16 Nov-Dec 1895
311	Jan-Feb 1896
312	Mar-May 1896
313	June-Aug 1896
314	Sept-Oct 1896
315	Nov-Dec 1896
316	July 1899
317-321	Undated

Subseries 3.1.2. Outgoing Correspondence

1886-1894. About 110 items, including 2 volumes.
Arrangement: chronological.

Largely copies of letters from Vass to individuals who owed him money concerning payments and related matters. Some letters concern rental property Vass owned. Included is an inventory of Vass's rental property and copies of letters he wrote resigning from jobs.

Loose Letters

Folder 322	15 Apr 1886-22 Dec 1890
323	11 Feb 1891-Oct 1892
324	10 Nov 1892-Dec 1893
325	31 Mar 1894-undated

Letterpress Copybooks

326	Sept 1873-July 1878, 20 pages (Vol. 22)
327	7 Apr 1893-22 Oct 1894, 100 pages (Vol. 23)

Subseries 3.2. Bills and Receipts

1836-1930. About 700 items.
Arrangement: chronological.

Receipts for loan and rent payments, and a ledger with records of these accounts; bills from cabinet makers, hardware stores, clothing stores, etc.; poll tax bills; and other bills and

FINDING AID, 1993

VASS, WILLIAM WORRELL, 1821-1896
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No. 739

receipts.

Folder 328	20 June 1836-31 Oct 1849
329	14 Jan 1850-10 Dec 1853
330	4 Sept 1854-6 Dec 1855
331	30 Jan 1856-28 Dec 1859
332	1 Jan 1860-27 Nov 1860
333	1 Jan 1861-21 Dec 1861
334	1 Jan 1862-30 Apr 1862
335	3 May 1862-30 Sept 1862
336	1 Oct 1862-31 Dec 1862
337	1 Jan 1863-28 Apr 1863
338	1 May 1863-3 Dec 1863
339	23 Feb 1865-3 Sept 1869
340	20 Jan 1870-9 Dec 1873
341	15 Jan 1874-30 Nov 1876
342	1 Feb 1877-15 Nov 1879
343	6 Mar 1880-21 Nov 1891
344	4 July 1892-21 Jan 1930
345A	Undated
345B	Undated ledger of loan accounts (Vol. S-24)

Subseries 3.3. Other Items

1868-1893. About 175 items, including 1 volume.
Arrangement: chronological.

Estate inventories; assorted legal documents, some with no clear connection to Vass; handwritten commentaries on books of the Bible; and miscellaneous other items.

Folder 346	30 Jan 1845-Nov 1868
347	3 Mar 1870-5 Sept 1873
348	Sept 1883-1887
349	15 Feb 1889-20 Dec 1893
350	Undated
351	Undated

Series 4. Other Materials.

1866-1898. 225 items.
Arrangement: chronological.

Personal letters addressed to others and not written by W. W. Vass, some concerning the Raleigh and Gaston Railroad, and some other papers. Included are detailed records, 1898, of the treatment of Vass's son, Will, for typhoid.

Folder 352	Dec 1866-Dec 1872
353	Jan 1873-July 1873
354	Aug 1873-Sept 1875
355	Feb-Aug 1879
356	Aug 1883-30 Dec 1889
357	11 Feb 1890-27 June 1891
358	3 July 1891-1 Mar 1893
359	6 May 1893- Undated

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VASS, WILLIAM WORRELL, 1821-1896
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No. 739

360

3 Sept-9 Dec 1898

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VASS, WILLIAM WORRELL, 1821-1896
PAPERS, 1834-1911

No. 739

Shelf List

Box 1	Subseries 1.1.1.	(folders 1-13)
Box 2	Subseries 1.1.1.	(folders 14-28)
Box 3	Subseries 1.1.1.	(folders 29-39)
Box 4	Subseries 1.1.1.	(folders 40-54)
Box 5	Subseries 1.1.1.	(folders 55-67)
Box 6	Subseries 1.1.1.	(folders 68-83)
Box 7	Subseries 1.1.1.	(folders 84-107)
Box 8	Subseries 1.1.1.	(folders 108-115)
Box 9	Subseries 1.1.2.	(folders 116-118)
Box 10	Subseries 1.1.2.	(folders 119-121)
Box 11	Subseries 1.1.2.	(folders 122-124)
Box 12	Subseries 1.1.2.	(folders 125-127)
Box 13	Subseries 1.1.2.	(folders 128-129)
Box 14	Subseries 1.2.	(folders 130-137)
Box 15	Subseries 1.2.	(folders 138-147)
Box 16	Subseries 1.2.	(folders 148-152)
Box 17	Subseries 1.2.	(folders 153-169)
Box 18	Subseries 1.2.	(folders 170-176)
Box 19	Subseries 1.3.	(folders 177-184)
Box 20	Subseries 1.3.	(folders 185-193)
Box 21	Subseries 1.4	(folders 194-203)
Box 22	Subseries 1.4	(folders 204-210)
Box 23	Series 2	(folders 211-212)
Box 24	Subseries 3.1.1.	(folders 213-241)
Box 25	Subseries 3.1.1.	(folders 242-271)
Box 26	Subseries 3.1.1.	(folders 272-292)
Box 27	Subseries 3.1.1.	(folders 293-305)
Box 28	Subseries 3.1.1.	(folders 306-321)
Box 29	Subseries 3.1.2.	(folders 322-327)
Box 30	Subseries 3.2.	(folders 328-342)
Box 31	Subseries 3.2.	(folders 343-345)
	Subseries 3.3.	(folders 346-351)
Box 32	Series 4.	(folders 352-361)

Items separated:

Volume 739/S-19B, S-24

APPENDIX I
FINDING AID, 2001

Inventory of the Boykin Family Papers, 1748-1932, 2001

Collection Number 78



Manuscripts Department, Library of the University of North Carolina at Chapel Hill

**Collection
Information**

- [▣ Descriptive Summary](#)
- [▣ Administrative Information](#)
- [▣ Online Catalog Headings](#)
- [▣ Biographical/Historical Note](#)
- [▣ Collection Overview](#)
- [▣ Organization of Collection](#)
- [+ Detailed Description of the Collection](#)
- [▣ 1. Correspondence, Financial, Legal, and Military Papers, 1748-1932 and undated.](#)
- [▣ 2. Genealogical Materials, 1884, 1901-1902, 2001, and undated.](#)
- [▣ Items Separated](#)

Contact Information:

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Processed by

SHC Staff

Date Processed

June 2002

Encoded by

Roslyn Holdzkom

Date Encoded

June 2002

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Descriptive Summary

Repository

Southern Historical Collection

Creator

Boykin family.

Title

Boykin Family Papers, 1748-1932, 2001

Call Number

78

Extent

800 items (1.0 linear feet)

Abstract

The Boykin family of Camden, S.C., included Alexander Hamilton Boykin (1815-1866), cotton planter, state legislator, and Confederate officer. The collection includes family, business, and military papers of Boykin family members, chiefly 1830s through 1862. Much of this material consists of correspondence and accounts with Reeder & DeSaussure, Charleston cotton factors, regarding cotton produced at the Plane Hill, the Boykin family plantation near Camden; bills of sale for land and slaves; legal papers; and correspondence among members of the Boykin and DeSaussure families, including Alexander Hamilton Boykin's wife, Sarah Jones DeSaussure Boykin (fl. 1835-1866) and his son, Alexander Hamilton Boykin, Jr. (1846-1923). There is also Civil War military material pertaining to Boykin's Rangers, which became Company A of the Second South Carolina Cavalry and which Boykin commanded in Virginia, 1861-1862. Items relating to Boykin family genealogy are also included.

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Administrative Information

Restrictions to Access

No restrictions.

Provenance

Gifts of Mrs. Burwell H. Boykin and May Boykin of Boykin, South Carolina, before 1940; with additions in February 1944 and January 1952 from May Boykin and Mary Boykin Haile of Boykin, South Carolina, and Mrs. Morris Boykin of Pelham, New York, and from Anthony T. Lathrop of Charlotte, N.C., in March 2002 (Acc. 99191).

Preferred Citation

[Identification of item], in the Boykin Family Papers #78, Southern Historical Collection, Wilson Library, University of North Carolina at Chapel Hill.

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Online Catalog Headings

These and related materials may be found under the following headings in online catalogs.

Boykin, Alexander Hamilton, 1815-1866.
 Boykin, Alexander Hamilton, 1846-1923.
 Boykin family.
 Boykin, Sarah Jones DeSaussure, fl. 1835-1866.
 Camden (S.C.)--History--19th century.
 Commission merchants--South Carolina--Charleston.
 Confederate States of America. Army. Boykin's Rangers.

Confederate States of America. Army. South Carolina Cavalry Regiment, 2nd.
 Cotton trade--South Carolina.
 DeSaussure family.
 Plane Hill Plantation (Camden, S.C.).
 Plantations--South Carolina.
 Reeder & DeSaussure (Charleston, S.C.).
 Slavery--South Carolina.
 South Carolina--Economic conditions.
 Virginia--History--Civil War, 1861-1865.

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Biographical/Historical Note

Alexander Hamilton Boykin (1815?1866) was the son of Burwell Boykin (1752?1817) and Mary Whitaker. Educated initially in Camden, he entered South Carolina College as a sophomore in 1832, but left the following year without receiving a degree. He became a successful planter in Kershaw and Sumter districts where he possessed 5,737 acres at his death. His residential plantation, which he purchased in December 1835, was Plane Hill near Camden. Other of Boykin's holdings included Hillyard, Carter Hill (700 acres), Millway, Pine Grove, and the Mill plantations on Swift Creek; Boykin's Mill in Sumter District; and tracts on the Wateree River. According to the 1860 federal census, his real and personal estates were valued at \$55,000 and \$241,000 respectively; the slave schedules for that year listed 189 slaves in Kershaw and 58 slaves in Sumter as his property.

Elected to the South Carolina House of Representatives, Hamilton Boykin represented Kershaw in 1846?1849 and 1852?1859. After Kershaw chose him for the state Senate in a special election, he resigned his seat in the House and qualified on 28 November 1859 for the Forty-third General Assembly. Subsequently, Boykin represented Kershaw in the Senate, 1860?1864. Locally, he was a member of the Wateree Agricultural Society, ca. 1841; director of the South Carolina Railroad Company, 1849; and a communicant at Grace Episcopal Church of Camden.

During the Civil War, Hamilton Boykin organized and financed Boykin's Rangers, which became Company A of the Second South Carolina Cavalry. As captain, he served from 26 June 1861 until 1 October 1862 when poor health forced him to resign. He engaged the enemy at the First Battle of Bull Run, 21 July 1861, and at Williamsburg, May 1862. Appointed judge advocate in December 1862 by Confederate president Jefferson Davis, he declined to serve, citing his lack of legal experience. Toward the close of the war, he expressed a strong dislike of Davis and his policies.

On 22 November 1835, Boykin married Sarah Jones DeSaussure, daughter of William Ford DeSaussure (b. 1792) and Sarah Davie. Nine children were born to them: William DeSaussure (1841-1858); Mary Whitaker (m. Edward Brevard Cantey); Alexander Hamilton, Jr. (1846-1923); Elizabeth Gabriella (m. Brown Manning); Burwell Henry; Elias Miller; Allen Jones; William DeSaussure (1852-1902); and Lemuel Whitaker.

Survived by his wife and eight children, Alexander Hamilton Boykin died 8 March 1866 in Charleston and was buried in the Quaker Cemetery in Camden.

Source: Reynolds, Emily B. and Jean Reynolds Faunt, eds., *Biographical Directory of the Senate of the State of South Carolina, 1776-1986*. Columbia, S.C.: South Carolina Archives Department, 1986.

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Collection Overview

This collection chiefly consists of business papers, but also includes some personal correspondence and military papers of Alexander Hamilton Boykin. There are also papers of Boykin's wife. After 1865, the papers are mainly those of Alexander Hamilton Boykin, Jr. There is also personal correspondence among other members of the Boykin and DeSaussure families.

The papers are mostly business correspondence from Reeder & DeSaussure, Charleston cotton factors; accounts; bills of sale for land and slaves; legal agreements; and personal and family letters. The papers for 1861-1862 are military papers of Captain A. H. Boykin, leader of Boykin's Rangers, a company of South Carolina mounted rangers, detailing the activities of the company in Richmond, Flint Hill, and Manassas, Virginia, during campaigns of the Army of the Potomac and the Army of Northern Virginia.

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Organization of Collection

1. Correspondence, Financial, Legal and Military Papers
 - 1.1. 1748-1860
 - 1.2. 1861-July 1865
 - 1.3. August 1865-1932
 - 1.4. Undated
2. Genealogical Materials

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Detailed Description of the Collection

1. Correspondence, Financial, Legal, and Military Papers, 1748-1932 and undated.

About 750 items.

Arrangement: chronological.

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1.1. 1748-1860.

About 250 items.

Arrangement: chronological.

Bills of sale for land, deeds, estate receipts, business letters, and accounts of A. H. Boykin relating to the operation of his plantation, Plane Hill near Camden, South Carolina, and some personal correspondence and other items, including papers of A. H. Boykin's wife, Sarah Jones DeSaussure, and some letters from her father, William Ford DeSaussure of Columbia, South Carolina. Included are numerous bills of lading and sales receipts for cotton sold through the Charleston firm of Reeder & DeSaussure. Notable items include a roll call from the South Carolina House of Representatives, 1789; bills of sale for slaves; correspondence from A. H. Boykin taking a cure at White Sulphur Springs, Virginia; a small notebook titled "A. H. Boykin" with entries dated 1835-1841; an informative letter from Richard L. Whitaker, dated 17 November 1843, appealing to Boykin as a fellow planter for assistance during hard times; a detailed receipt for landscaping at Plane Hill listing plants used (with botanical names); a letter from DeSaussure to Boykin about the South Carolina "Palmetto" regiment in Mexico, 1847; "List of Votes Taken" in a South Carolina state election, 11 and 12 October 1852, from several small towns near Camden; an informative letter from W. J. DeSaussure about a student riot at the University of South Carolina in 1856.

Several letters from the latter half of 1860 relate to Boykin's visit to Richmond, Virginia, and include brief discussions of a convention held there. In letters dated 12 June and 25 July 1860, there are passing references to Boykin's niece, Mary Boykin Chesnut, but there is no correspondence with her in this collection.

Folder 1

1748-1836

Folder 2

1837-1841

Folder 3

1842-1843

Folder 4

1844-1846

Folder 5

1847-1851

Folder 6

1852

Folder 7

1853

Folder 8

1854

Folder 9

1855

Folder 10

1856

Folder 11

1857

Folder 12

1858

Folder 13

1859

Folder 14

1860

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1.2. 1860-July 1865.

About 250 items.

Arrangement: chronological.

Largely military papers and orders for Captain A. H. Boykin and his company of independent mounted rangers for the years 1861-1862. The first significant war letter is from Boykin to his wife on 30 April 1861 from his camp in northern Virginia. The materials during these years include the following: several muster rolls for Boykin's Rangers, personal and general orders, leaves of absence, court materials, discharges, notices forbidding officers' private use of captured ambulances, and notices forbidding drunkenness and the careless discharge of firearms. Letters and other materials in 1865 include a copy of a letter from Reverend Robert Wilson to his mother-in-law, Mrs. Robert W. Shand, giving a graphic account of the pillage of Columbia, South Carolina (17 February 1865); "The Tell-Tale Letter Picked Up by a Slave," a typescript narrative and transcription of letters regarding the experiences of Mrs. John Johnson (then Miss Floride Cantey) and her mother in February 1865 in their home near Camden during its occupation by Sherman's army; John W. DeSaussure's emancipation of his slaves (22 June 1865), and A. H. Boykin, Jr.'s oath of allegiance (24 June 1865).

Folder 15-21

1861

Folder 22-25

1862

Folder 26

1863-July 1865

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1.3. August 1865-1932.

About 200 items.

Arrangement: chronological.

Post-Civil War materials include business accounts and invoices detailing the Boykins' return to full-scale cotton planting, as well as items documenting effects of Reconstruction in South Carolina. Papers include "Articles of Agreement between Freedmen and Women and S. Boykin," dated 23 January 1868; notes and letters about labor problems on post-war South Carolina plantations; and a Universal Life Insurance Company almanac, 1875, with brief financial records kept by an unknown person.

Folder 27

August-December 1865

Folder 28

1866

Folder 29

1867

Folder 30

1868

Folder 31

1869

Folder 32

1870

Folder 33

1871-1873

Folder 34

1874-1878

Folder 35

1880-1881

Folder 36

1882-1932

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1.4. Undated.

About 40 items.

Personal and family letters, undated slave lists, and plantation account receipts. Items of note include a letter to the editor of the *Camden Journal* by A. H. Boykin in reference to political issues of state and local interest and some miscellaneous undated military papers.

Folder 37-38

Undated

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2. Genealogical Materials, 1884, 1901-1902, 2001, and undated.

11 items.

Two letters about gathering genealogical information; the "Family Record of Captain James Boykin, C.S.A." (1823-1907), as told to his son-in-law, H. H. Parker in 1884; "Descendants of Allen Jones Boykin and Elizabeth Chardon Courtney through 2001" compiled by Sally Hardy; and other Boykin family trees and charts.

Folder 39-40

Genealogical materials

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Items Separated

Separated materials include oversize papers (OP-78/1-6).

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