

The shelf survey

One line per box, volume or folder, in its existing order. Copy this sheet as needed.

Type: MIN minutes; PET petitions; COR correspondence; LED accounts; PHO photographs; PRG programs/newsletters; PRO property papers; REG objects; OTH other; UNK unknown. **Condition:** G stable; F minor visible wear; P poor/brittle/torn or old water damage: pause for handling advice; S stop: wet, suspected mold, pests or material crumbling/detaching. These are volunteer observations, not a diagnosis. **Priority:** marks urgency for assessment, not permission to handle.

[illegible]

Survey by _____ With _____ Date _____ Page ____ of ____ . Shelf-image folder _____. Unknown dates stay UNKNOWN; label estimates and their basis. Keep this survey in the restricted catalog records.

The page-sequence log

One per volume or folder. Use continuation sheets for individual gaps, inserts and retakes.

Batch ID / log page ____ of ____	
Title / creator / years or UNKNOWN	
Original location / survey reference	
Photographer / dates / device / native file type	
Station / light / page size / test settings	
First and last image names / total original images	
First five test images / result / check by and date	
Sequence-to-page mapping (e.g., 0004 = printed page 1)	
Inserts: location found / views / associated image IDs	
Missing, unreadable or uncaptured areas / reason	
Retakes and detail shots / selected reading source	
Transferred to / date / transfer verification	

Image number and printed page number are different. Include covers and blank pages in the image sequence. Capture inserts in the sequence when encountered; record where they belong. Attach a full filename list and any original-to-renamed mapping. Final completeness is recorded on page 18.

Continuation notes / attachment IDs

The catalog

One line per volume, folder, box or significant item. Link the access decision and completion record.

Access: U unreviewed (default: no distribution); O approved access as specified in the linked decision; L specified lodge audience; R named people/roles under restrictions; C closed pending review. O is not a copyright license. L does not mean every member automatically. A review date never opens access by itself. Write UNKNOWN for unknown facts; label estimates with their basis. Keep the master catalog restricted.

Batch ID	Creator / owner	Description	Dates / basis	Original location	Count / date / operator	Cond.	Access code	Decision ID / review date / completion status / related items

Identification changes must include the source, initials and date. Preserve what the original says alongside later interpretation. Access decision: page 19. Batch completion: page 18. Catalog maintained by _____ Date _____ Sheet ____ of ____.

Preserve it

Three independent copies, at least one off site, with access that survives a handover.

The copies

Keep masters, derivatives, catalog, survey, logs and permissions in three independent copies. Use different storage media where practical; two brands of drive are still the same media type. Keep at least one copy off site. A synchronized mirror alone is not an independent backup if deletion or damage propagates to it.

Locations and people

For example: a controlled working set, a separate backup with recoverable versions, and an off-site backup. Every location, cloud service and custodian must be authorized for the material. A library deposit adds no reader automatically. Keep paper-record and oral-history access zones distinct even if one custodian manages both.

Verify, restore, maintain

After each batch, verify transfers with file counts and checksums where possible; investigate differences. Periodically restore files from each backup and open them. At least annually review inventory, permissions, recovery, media condition and supported formats. Migrate when condition or support requires it; five years is not a guaranteed service life.

Custodian and succession

Use separate authorized accounts and a documented recovery method; do not share passwords or write them here. A deputy or successor receives only authorized access. Record the transfer of responsibility, devices, inventory, restrictions and recovery arrangements. Revoke obsolete access and test the incoming custodian's recovery.

Formats

Preserve native originals and metadata. An unchanged copy is not lossy conversion. JPEG-to-TIFF cannot restore lost detail. If migration is needed, document it, verify the result and retain the original where feasible. No format is guaranteed readable for decades without maintenance.

Copy	Location / device or service	Authorized users / decision ID	Verified / restore date	Next check

Handover: outgoing _____ incoming _____ date _____. Authority/record ID _____; inventory, restrictions and recovery checked _____. Signatures: _____ / _____.

Who may see what

Preserving, granting access and publishing require separate decisions.

Default to unreviewed

Keep the preservation set under approved custodial access. Mark unreviewed material U; do not distribute it. Record the owner, applicable confidentiality rules, other rights and approving authority before deciding access. Age, family relationship, a donation or an officer's title alone does not settle the question.

Review the actual material

Petitions, investigation reports, discipline, personal correspondence, relief, medical and financial records need particular care. Ordinary minutes, ledgers and photographs can also expose private details. A person's consent does not override someone else's rights or governing restrictions.

Approve the exact audience and version

Use page 19 for a specific request or clearly defined standing access decision. Identify batch IDs, pages, filenames, recipient/audience and purpose. Reading-room access, family copies, lodge playback, newsletter publication, websites and repository deposits are different uses. Record what is permitted and any limits on further sharing.

Make and check release copies

Keep the master unchanged. If an authorized release requires redaction, make a separate version. Use a true redaction process; a black rectangle alone can leave hidden text or image data. Check layers, OCR, metadata and attachments, then reopen the final file and test copying/searching. Keep the approved exact version and decision linked.

Respond and record

Acknowledge a request courteously, then review it. Do not promise a copy before approval. Record denials or deferrals as well as releases. If restrictions change, stop affected access and track changes across controlled copies, indexes and derivatives. Explain that already distributed copies may not be fully recoverable.

Date	Request ID	Requester / purpose	Batch / exact version / result	Decision ID / authority

This log is private. Page 19 holds the detailed decision; a review date is a reminder to reconsider, never automatic permission.

Where it all goes

Decide custody before a merger, closure, move or loss of a keeper.

Destination and authority

Record the applicable rule and receiving body for originals and digital copies. Confirm that the recipient accepts the material and restrictions. Ownership, custody and copyright are different questions. A digital copy does not satisfy a requirement to transfer originals unless the governing authority says so.

Reconcile the terms before transfer

A repository may require its own deposit or deed-of-gift agreement. Review and resolve conflicting terms before signing; this receipt alone is not a substitute. Copies cannot go wherever a custodian prefers. Include authority, inventory, conditions, restrictions, packing and the agreed destination in an attached movement record.

Movement / agreement ID / approval reference	
Transfer or temporary loan / purpose / date	
Records and copies transferred (attach item inventory)	
From: body / responsible person / signature	
To: body / recipient / signature	
Condition / packing record and attachments	
Restrictions / permitted access / receiving agreement	
Due date if loan / return condition check / signatures	

Both parties retain the receipt and attachments. For a temporary move, name the person responsible, record departure and return condition, and follow up at the agreed due date. Keep the catalog location current.

Out	Item / record ID	Recipient / destination	Reason / authority	Due	Returned / checked

Batch completion and verification

Check every image. Explain any omission. A partial capture can be useful if its limits are clear.

Batch ID / completion record ID / date	
Sequence log and filename inventory IDs	
Expected views / captured views / gaps explained	
Final selected images reviewed by / date	
Retakes resolved / unreadable original areas noted	
Original-to-new filename mapping location	

Mark each after checking. Attach an exception list for anything unresolved.

- ☐ Every image opens; full-page edges, center, corners and gutter checked for readable detail.
- ☐ Order, covers, blanks, backs and inserts reconciled against the original where safe.
- ☐ Detail shots and retakes linked; no source overwritten; native extensions and metadata retained.
- ☐ Counts and transfers verified; discrepancies investigated; checksum inventory attached if used.
- ☐ All three independent copies updated; at least one off site; backup recovery tested.
- ☐ Catalog, access code and decision links current; originals returned to the recorded location.

Copy 1 / location / verification method / result / date	
Copy 2 / location / verification method / result / date	
Copy 3 / location / verification method / result / date	
Status: complete / incomplete / deferred (circle)	
Exceptions / action owner / target date (attach list)	
Custodian signature / next review date	

“Complete” means the planned scope is captured, checked and preserved, with any original gaps explicitly recorded. It never means approved for public release. Access decisions belong on page 19.

Access and release decision

One specific request or defined standing access rule. Attach exact files, pages and governing terms.

Decision ID / linked request ID / decision date	
Batch IDs / exact image or file versions / page ranges	
Owner / creator / authority and rule references	
Requester / recipient or defined audience / purpose	
Decision: approve / deny / defer (circle) / reason	
Access code: U / O / L / R / C (definitions on page 12)	
Permitted use / format / method / further-sharing limits	
Redactions / exclusions / checked release-version ID	
Permitted users / storage services / custodians	
Start / end if applicable / review date (not auto-release)	
Approving authority: name / role / signature / date	
Recipient terms acknowledged by / date / record ID	
Actual release: by / date / method / version / recipient	

No blank field, silence or elapsed date creates permission. Copying, research access and publication are different. A standing rule must define its covered material, audience and uses; otherwise obtain a new decision for the new use. Restriction change or withdrawal: record the request date, affected IDs, authority, action, responsible person and completion date on a continuation sheet. Stop affected use while reviewing. Track controlled sources, backups, OCR, catalog, reading and release copies; record limits on recalling material already distributed.